

Featuring a foreword by Judith Adler Hellman, author of  
*Mexican Lives* and *The Rock and the Hard Place: the World of Mexican Migrants*



COLLECTED ESSAYS OF CONTRIBUTORS TO THE 11TH ANNUAL INTERNATIONAL STUDIES SYMPOSIUM

# ACROSS BORDERS

DIVERSE PERSPECTIVES ON MEXICO

EDITED BY  
JESSICA PERKINS • KAREN CAMPBELL

# Across Borders

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## Diverse Perspectives on Mexico

Collected Essays of Contributors to the  
11th Annual International Studies Symposium

Edited by Jessica Perkins & Karen Campbell



*Across Borders: Diverse Perspectives on Mexico*

Collected essays of contributors to the 11th Annual International Studies Symposium

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# Across Borders

## Diverse Perspectives on Mexico

This publication contains a compilation of papers written by some of the distinguished Mexican specialists who participated in *Across Borders: Diverse Perspectives on Mexico*, the 11<sup>th</sup> Annual International Studies Symposium that took place on February 11, 2006. The symposium was successfully organised and fundraised by the Independent Study Committee on Mexico, a group of six undergraduate students from the BA program in International Studies at Glendon College, York University. It featured seven panels and twenty speakers, ten of whom have contributed to this volume. The panelists represented an array of disciplines - anthropology, sociology, economics, history, political science, international relations/studies, Canadian studies, Mexican studies, gender studies, environmental studies, migration studies, and cultural studies - and included business leaders, diplomats, and academics.

Established in 2003, the Independent Study Committee on Mexico was created to take on the task of emulating a project designed by students eleven years prior. No professor started the committee, chose its members, or decided upon the country of study. No member of this committee had been to Mexico, or had even taken a course on Mexico. In fact, only one group member could speak Spanish fluently. What would lead us to taking on this seemingly incredible task? We can honestly say that it was the thrill of the challenge. Our goal was to learn more about a particular country in the world, so why not create opportunities for dialogue and interaction on our own with the individuals who could educate us and support our efforts?

If there is anything that our program at Glendon has encouraged, it has certainly been to test boundaries. The symposium organised by the ISCMexico was a success in two ways: first, it fostered a dialogue among a wide variety of perspectives and subjects, and brought in a general audience of more than 200 individuals to the event. Second, it was successfully organised by a group of students who needed to take on an entirely new role - from students to organisers - armed with a great deal of enthusiasm, determination, and professionalism that was not, frankly speaking, often expected from us.

As to why this may be of interest to the readers, it is important to understand that the papers in this volume are a product of the



symposium, and have been edited by two members of the Committee who are not experts on Mexico. In publishing this volume, we hope that our efforts will continue to enrich the knowledge that exists on Mexico, and will challenge the stereotypes held by North Americans who may or may not know very much about their neighbour.

We do not claim that this is a comprehensive reader or textbook. Rather, for those who wish to gain a sense of the complex relationship that the Mexican state has with its North American neighbours and with its diverse population domestically, this volume is generally intended for an academic audience that seeks to learn about some of the current issues and lived realities that face the incredibly diverse groups of people in Mexico.

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*"The Puebla-Panama Plan: A Strategy for Regional Development?"*

Alejandro Álvarez Bejar (Ph.D. Sociology) is a political activist and full-time professor in the Faculty of Economics at UNAM. His current and ongoing research is on the Puebla-Panama Plan (PPP) and the sub-regional impacts of economic integration in the Centre-North and Southeast regions of Mexico. He is the author of many articles on the Mexican and global economies, Mexican politics and unions, and NAFTA. He is the author of *La crisis global del capitalismo* and is completing a book entitled *México en la jaula de hierro del neoliberalismo: economía mundial, bloques regionales, y resistencia social* (Mexico in the Iron Cage of Neoliberalism: World Economy, Regional Blocs, and Social Resistance). He has been on the editorial board of, and has acted as a regular contributor to, *Punto Crítico* and *Corre la Voz*.

## **JUAN BOSCO MARTÍ ASCENCIO**

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*"Presentation Text, Canada-Mexico Relations"*

On February 1, 2004, Juan Bosco Martí Ascencio was appointed Director General for North America at the Secretariat of Foreign Affairs (SRE) of Mexico. From 2003 to February 2004, he acted as Chief of Staff for the Undersecretary for North America at the SRE. He participated in President Fox's economic transition project and in financial sector coordination. Mr. Martí was advisor in the President's Public Policy Office where he participated in the creation of the U.S.-Mexico binational programme, P4P. He coordinated diverse studies which focused on increasing competitiveness in the North American region. Mr. Martí has vast experience in the financial sector as well as in

investment banking companies like Merrill Lynch and Arthur Andersen. He is the Coordinator of the Mexican Government's Relief Efforts of Evacuees of Hurricane Katrina and personal representative of the Secretary of Foreign Affairs of Mexico, Luis Ernesto Derbez.

## **JOHN GLEDHILL**

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*"Indigenous Movements in Mexico: Impasse or Forward Motion?"*

John Gledhill is Max Gluckman Professor of Social Anthropology and Co-Director of the Centre for Latin American Cultural Studies at the University of Manchester, a member of the U.K. Academy of Social Sciences, and Chair of the Association of Social Anthropologists of the U.K. and Commonwealth (2005-2009). His publications include *Casi Nada: Agrarian Reform in the Homeland of Cardenismo* (1991), *Neoliberalism, Transnationalization, and Rural Poverty* (1995), *Power and Its Disguises: Anthropological Perspectives on Politics* (2000) and *Cultura y Desafío en Ostula: Cuatro Siglos de Autonomía Indígena en la Costa-Sierra Nahua de Michoacán* (2004).

## **MATTHEW C. GUTMANN**

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*"Mexican Machos and Hombres"*

Matthew C. Gutmann is Associate Professor of Anthropology at Brown University, where he teaches classes on gender and sexuality, health, political anthropology, ethnicity and race, and ethnography in the Americas. He has a Ph.D. and M.P.H. from the University of California at Berkeley and has been a visiting professor in France, Mexico, and Spain. He has been awarded numerous fellowships and grants, including a National Endowment for the Humanities University Professor Fellowship. Among his publications are *The Meanings of Macho: Being a Man in Mexico City* (California, 1996; Spanish version: *Colegio de México*, 2000), *The Romance of Democracy: Compliant*



Defiance in Contemporary Mexico (California, 2002; Spanish version: Fondo de Cultura Económica, 2005), *Mainstreaming Men into Gender and Development: Debates, Reflections, and Experiences* (with Sylvia Chant; Oxfam, 2000,), and the edited volumes *Changing Men and Masculinities in Latin America* (Duke, 2003) and *Perspectives on Las Americas: A Reader in Culture, History and Representation* (with Felix Matos Rodriguez, Lynn Stephen, and Patricia Zavella; Blackwell, 2003).

## **JULIA MURPHY**

*Assistant Professor, Department of Anthropology  
University of Calgary*

*"Anthropological Perspectives on Environmental Concerns in Rural Mexico: Ethnography in the Calakmul Model Forest, Campeche"*

Julia Murphy is a faculty member in the Department of Anthropology at the University of Calgary. Originally trained as a biologist, her graduate degrees are from York University's Faculty of Environmental Studies (FES) and Department of Social Anthropology (M.A., Ph.D). Her graduate research examined rural development initiatives in Yucatec Maya ejidos in the states of Quintana Roo and Campeche. Her Mexican research interests include ethnographic perspectives on development, natural resource management and environmentalism, gender and women's involvement in politics, and indigenous peoples.

## **SUSIE PORTER**

*Associate Professor, Departments of History & Gender Studies  
University of Utah*

*"Nosotras: Representations of Gender and Class Identities of Female Office Workers in Post-Revolutionary Mexico"*

Susie Porter is Associate Professor in the Department of History and the Gender Studies Programme at the University of Utah, Salt Lake City. She is the author of *Workingwomen in Mexico City: public discourses and material conditions, 1879-1931* (Tucson: University of Arizona Press, 2003), which was awarded "Outstanding Publication" by the Latin American Studies Association, Labour and Class Relations Studies Section (2005). She is also the co-editor of a publication in press on Mexican women's and gender history. Dr. Porter recently completed work as Director of Latin American Studies at the University

of Utah, and hosted the third International Colloquium on the History of Women and Gender in Mexico. She currently lives in Mexico City with her husband and two children and is conducting research on gender and middle-class identity, 1920-1950. Her current research is funded by the Fulbright Foundation.

## **RICHARD ROMAN AND EDUR VELASCO ARREGUI**

*Associate Professor, Retired, Department of Sociology,  
University of Toronto*

*Professor, Department of Economics, Universidad Autónoma  
Metropolitana-Azcapotzalco*

*"The Impact of Neoliberal Reforms and Mexican Emigration on the  
North American Labour Market"*

Dr. Roman was a professor of Sociology at the University of Toronto for three decades and has been an Associate Fellow of the Centre for Research on Latin America and the Caribbean at York University for many years. He is presently teaching a graduate seminar on Advanced Issues in Latin American Politics in the Political Science Department at York University. Dr. Velasco is Professor of Economics at the Universidad Autónoma Metropolitana-Azcapotzalco, Mexico City, and has been a long-time activist in the Mexican labour union movement. They have been conducting research together on Mexican workers, trade unions, and continental integration for a number of years and have published various articles on these topics in academic and political journals. They are in the process of completing two books on these themes: *The Peculiarities of Mexican Development: Mexican Workers, Unions and the State*, and *Mexican Workers, NAFTA and Continental Integration*.

## **DAVID SHIRK**

*Director, Trans-Border Institute  
University of San Diego*

*"Addressing Trans-Border Migration and Development"*

David Shirk has been the Director of the Trans-Border Institute since 2003. He is Assistant Professor in the Political Science Department and received his Ph.D. in Political Science at the University of California, San Diego. Dr. Shirk conducts research and publishes on topics related



to Mexican politics, U.S.-Mexican relations, and a variety of policy issues along the U.S.-Mexico border. Recent publications by Dr. Shirk include *Mexico's New Politics: The PAN and Democratic Change* (Colorado: Lynne Rienner, 2005); a forthcoming co-edited volume, *Reforming the Administration of Justice in Mexico* (forthcoming, 2006); "Slavery Without Borders: Human Trafficking in the U.S.-Mexican Context," *CSIS Hemisphere Focus*, January 23, 2004; and a forthcoming co-authored book, *Contemporary Mexican Politics* (Rowman and Littlefield Publishers, forthcoming).

### **JOHN STOLLE-McALLISTER**

*Assistant Professor, Department of Modern Languages and Linguistics  
University of Maryland, Baltimore County  
"Social Movements and the Questioning, Shaping, and Challenging of  
Mexican Democracy"*

John Stolle-McAllister earned his Ph.D. in Cultural Studies from the University of Minnesota in 2000 and is currently Assistant Professor of Spanish and Cultural Studies at the University of Maryland, Baltimore County. His research analyses the political and cultural work of local organisations and small communities in opposing outside projects and adapting national and global thought and practice to their particular contexts. He teaches classes on Latin American cultural issues, human rights and ethnography. He has published several articles on social movements, the Mexican Transition, and popular culture, and his book, *Mexican Social Movements and the Transition to Democracy* (McFarland, 2005), details the cultural processes in Tepoztlán's anti-golf course and Atenco's anti-airport movements. His current project involves examining and comparing the discourses of indigenous identity and pluriculturalism in social movements in Ecuador and Mexico.

### **DUNCAN WOOD**

*Director, Canadian Studies & International Relations Programmes  
Instituto Tecnológico Autónomo de México  
"The Future of Mexico-Canada Relations: Thinking Outside the  
Federal Box"*

Duncan Wood received his B.A. (hons) in Politics from Leicester University in the U.K. in 1989, his M.A. in Political Science from

McMaster University, Canada in 1990, and his Ph.D. in Political Studies from Queen's University, Canada in 1996. Since 1996 he has been teaching and researching at the Instituto Tecnológico Autónomo de México (ITAM) in Mexico City where he directs the Canadian Studies Programme and, since January 2001, has been Director of the Undergraduate Programme in International Relations. Dr. Wood's research focuses on the political economy of international finance, Canadian, British, and Mexican foreign policy, and in particular in recent years on Canada-Mexico relations. Dr. Wood is also Director of a consulting company called ThinkMexico, providing services to foreign and national firms in the Mexican and Latin American contexts.

# Symposium Panellists

## **DAVID BARKIN**

*Professor, Department of Economics  
Universidad Autónoma Metropolitana-Xochimilco*

Dr. David Barkin is Professor of Economics at the Xochimilco Campus of the Universidad Autónoma Metropolitana in Mexico City. He received his P.h.D. in Economics from Yale University and was awarded the National Prize in Political Economics in 1979 for his analysis of inflation in Mexico. In 2005, the University of Guadalajara honoured him with its “Recognition for Lifetime Achievement in the advance of knowledge and the training of scholars in social sciences.” He is a member of the Mexican Academy of Sciences and of the National Research Council. In 1974, he was a founding member of the Ecodevelopment Centre. His most recent books include: *Wealth, Poverty and Sustainable Development* and *Innovaciones Mexicanas en el Manejo del Agua*. He is interested in the process of unequal development that creates profound imbalances throughout society and promotes environmental degradation. His recent research focuses on the implementation of alternative strategies for the sustainable management of resources. Much of his work is conducted in collaboration with local communities and regional citizens’ groups.

## **RAFAEL J. CORTÉS**

*Trade Commissioner of Mexico  
Bancomext*

Rafael Cortés holds a B.A. in Political Science & Public Administration and M.A. in Economics & Business Law from the Universidad Iberoamericana, as well as an M.B.A. from the Kellogg-Schulich programme. Before joining the Mexican Bank for Foreign Trade in 1989, Mr. Cortés worked at the Mexican Ministry of Planning and Budget as Financial Director of the National Institute for Statistics, Geography and Informatics. He also served at the Ministry as Chief Administrative Officer for the Undersecretary’s Office. He was



Marketing Manager for North America at the External Promotion Directorate of the Mexican Bank for Foreign Trade, and was Deputy Trade Commissioner for Mexico in Miami from 1991 to 1995. He has represented the Mexican Bank for Foreign Trade in extensive commercial missions to the U.S. and was appointed Trade Commissioner of Mexico in Toronto on April 1, 2000.

## **DANIEL DRACHE**

*Director, Robarts Centre for Canadian Studies  
York University*

Daniel Drache is Associate Director of the Robarts Centre of Canadian Studies and a professor of Political Science at York University. He has written extensively on globalisation, North American economic integration, and new state forms and practices. He is a regular commentator on national news for the CBC and other networks. His latest book, *Borders Matter: Homeland Security and the Search for North America* (Halifax: Fernwood, 2004) is also being published in Spanish and French editions.

## **EMMANUEL KAMARIANAKIS**

*Counsellor (Commercial) and Trade Commissioner (Trade Policy)  
Embassy of Canada in Mexico*

Emmanuel Kamarianakis is Counsellor (Commercial) and Trade Commissioner (Trade Policy) at the Canadian Embassy in Mexico. He is responsible for all trade policy issues between Canada and Mexico, and supervises the trade promotion side for the Environment and ICT units. Originally from Montreal, Quebec, Mr. Kamarianakis completed his studies in Business at the University of Calgary in Calgary, Alberta. Before being recruited by the Canadian Foreign Service, he worked on the Alberta Stock Exchange, a venture-capital exchange specialising in resource industries. He began his career with the Department of Foreign Affairs and International Trade in 1993. Mr. Kamarianakis has previously been posted abroad in Tehran, Iran and in Athens, Greece. In Tehran, he was responsible for the Oil and Gas Sector. Before coming to Mexico, he acted as Senior Trade Commissioner responsible for Canada's trade and economic relations with Greece, in Athens.

## **HEIDI KUTZ**

*Director for Mexico and North American Division  
Foreign Affairs Canada*

Ms. Kutz is currently the acting Director of the Mexico and North America Division for Foreign Affairs Canada. She received a B.A. in Communications from the University of Calgary, and an M.A. in Public Administration from Carleton University, Ottawa. Since 1995, she has worked in various divisions and offices of the Canadian government, including the Parliamentary Relations Division, Peace-building Division, and Indian and Northern Affairs Canada. In 1996, she was assigned to the Mexico Division in the Canadian Embassy in Mexico, where she was also stationed from 2001-2004. She was involved in the Inter-American Division of Foreign Affairs Canada as a Coordinator for the Summit of the Americas (1999-2001), and in 2005 she became Deputy Director of the U.S. Advocacy and Mission Liaison Division.

## **CASSIO LUISELLI FERNÁNDEZ**

*Director, International Studies Department & Centre for Mexican  
Studies  
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Keynote Speaker*

Dr. Cassio Luiselli Fernández is a Mexican economist. He obtained his M.S. in Economics and Ph.D. in Development Studies at the University of Wisconsin-Madison. He has written over forty-five technical and academic articles, and is author and co-author of several books. Dr. Luiselli received decorations from the Food and Agriculture Organization (FAO), as well as from the French, Italian, Japanese, Bulgarian, and Korean governments. He also received the Kellogg's Foundation Food System Leadership award. He has previous teaching experience at UNAM, Universidad Iberoamericana, El Colegio de México, Instituto Matías Romero de Estudios Diplomáticos, and TEC de Monterrey.

Within the Public Administration he has worked for the Treasury, he was advisor to President Fox and he was coordinator of the Mexican Food System. With the Fox administration he was Subsecretary of Environmental Regulation at the Ministry of the Environment and Natural Resources until September 2004, and Co-

President of the Mexico-Korea Commission for the 21<sup>st</sup> Century. Dr. Luiselli was Ambassador of Mexico to the Republic of South Korea and the first Ambassador to the Republic of South Africa when Nelson Mandela was elected president. He also held posts as Ambassador in five other African countries, and was permanent observer of Mexico to the Southern African Development Community.

### **ALBERTO MIRANDA**

*Senior Vice President  
Scotiabank Inverlat*

Alberto Miranda holds an Industrial Engineering degree from the Universidad Iberoamericana at Mexico City and an M.B.A. from Kellogg-Northwestern University. He joined Scotiabank's Mexican subsidiary in 1987. At Scotiabank Inverlat, he has held different senior management positions in corporate finances, equity research, compliance, market risk management, and strategic planning. He was heavily involved when Scotiabank increased its Inverlat ownership from 55% to 91% (now at 97%) and was part of the Scotiabank Inverlat's Board of Directors for more than three years. He has been working in Toronto since 2003, in different credit areas as part of a training programme, where he has been exposed to credit adjudication for Canadian, American, and Mexican companies.

### **ISIDRO MORALES MORENO**

*Visiting Scholar, School of International Service  
American University, Washington D.C.*

Dr. Isidro Morales Moreno is currently a visiting Fulbright scholar at American University, in Washington D.C., working on a book about the present and future of regionalism in North America. He is a member of Mexico's National Research System, the Academic Council for the United Nations System, and the Mexican Council for Foreign Affairs. His main research areas are the geopolitics and geo-economics of trade and investment markets, the political economy of regional integration, U.S.-Mexico trade relations, and U.S.-Latin American relations. He has co-authored two books and published several articles in specialised journals, which recently include, "Post-sovereign Governance in a Globalizing and Fragmenting World: The Case of Mexico," and



“Estados Unidos y el ‘regionalismo abierto’ en las Américas. Lecciones del TLCAN para México y para las negociaciones del ALCA”.

## **ANNE RUBENSTEIN**

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Anne Rubenstein is Associate Professor of History in the Faculty of Arts, York University. Her first book, *Bad Language, Naked Ladies, and Other Threats to the Nation: A Political History of Comic Books in Mexico* (Duke University Press, 1998) was translated and published last year by the Fondo de Cultura Económica under the title *De los Pepines a los Agachados. Comics y censura en México*. With Eric Zolov and Gil Joseph, she co-edited *Fragments of a Golden Age: Cultural Politics in Post-Revolutionary Mexico* (Duke University Press, 2001.) Her recent research extends her interests in media, politics, and gender in Mexican history, concentrating on movie audiences, movie-going, fashion, and fans from the 1920s to the present.

## **ERIC ZOLOV**

*Associate Professor, Department of History  
Franklin & Marshall College*

Eric Zolov is Associate Professor in the Department of History at Franklin & Marshall College and Associate Editor for *The Americas: A Quarterly Review of Inter-American Cultural History*. He is the author of *Refried Elvis: The Rise of the Mexican Counterculture* (University of California Press, 1999) and co-editor and contributor to *Fragments of a Golden Age: The Politics of Popular Culture in Mexico Since 1940* (Duke University Press, 2001), and *Rockin' Las Américas: The Global Politics of Rock in Latin/o America* (University of Pittsburgh Press, 2004). He is also co-editor of the classroom reader, *Latin America and the United States: a Documentary History* (Oxford University Press, 2000). Currently he is researching and writing on the impact of the Cuban revolution on Mexican political culture and U.S.-Mexico relations during the 1960s, for which he has received a Fulbright fellowship (2002) and National Endowment for the Humanities fellowships (2001-02; 2005).



# Foreword

Judith Adler Hellman

In April 2005, I received an e-mail from a group of International Studies students at Glendon College, who invited me to meet with them to formulate plans for a symposium to be held at Glendon in February 2006. This group – formally known as the “Independent Study Committee on Mexico” – made clear from the outset that this event would be organized and run entirely by undergraduate students, and would be the eleventh in a series of annual symposia, each focused on a different area of the world and on a different theme.

Meeting over dinner, I began to propose the names of Ontario-based experts on Mexico, but it soon became clear that the students’ vision was to invite faculty from York University but also reach beyond the local pool of *mexicanistas* to include experts from across Canada, from Europe and the United States, and of course, from Mexico. Moreover, they hoped to bring together Canadian and Mexican diplomats and business leaders with the distinguished academics who would attend and present papers.

To be sure, the students seemed disappointed to learn that February 2006 would find me on sabbatical and pursuing my own research in Mexico and New York. However, seeing that I had let them down in this regard, I tried to compensate by throwing out name after name of some of the most important contemporary analysts of Mexican politics and society, hoping that at least one or two of these leading lights would actually make the trip to Toronto in the middle of winter, and that, for the rest, the students might fill in the spaces with the unquestionably strong corps of experts on Mexico that we are fortunate to have in Toronto.

I wished these enthusiastic students good luck, requested that they keep me on their mailing list, and went off on my own sabbatical travels. Because I was out of the loop for roughly one year, readers can imagine my surprise and delight to find myself, in March 2006, at the meetings of the Latin American Studies Association, the premier conference in our field, where one important Mexicanist after another



came up to me to say: "Wherever have you been? I was invited by a group of undergraduates to the most splendid one-day event at Glendon College, and I figured on seeing you there, and all I can say is that you missed a wonderful experience!"

Thus, I necessarily felt great regret that poor timing put me far away from Toronto at the very moment that I might have enjoyed what others insisted was a wonderful day of exchange of ideas. At the same time, I had the great pleasure and pride to hear from Canadian and international colleagues of the success of our students' hard work. Under the circumstances, I must console myself with the fact that the organizing committee had the wit to collect and publish the papers that were presented and that those of us who were not lucky enough to be present can now access at least some of the stimulating discussion that unfolded.

And so it is that the thinking of experts like the renowned anthropologists of Mexico, John Gledhill, Matthew Gutmann, and Julia Murphy, the political economists, Alejandro Álvarez Bejar, Richard Roman and Edur Velasco, the cultural studies expert, John Stolle-McAllister, the historian, Susie Porter, and political scientists, David Shirk and Duncan Wood, are now available to all of us.

It is nothing short of remarkable that all this has been fashioned by a group of undergraduate students who have clearly demonstrated what curiosity about the world, combined with great energy and enthusiasm, can produce.

Judith Adler Hellman is Professor of Social and Political Science at York University, and the author of books that include *Mexico in Crisis* (1978, 1983, 1988), *Mexican Lives*, (1994, 1998) and *The Rock and the Hard Place: The World of Mexican Migrants*, (forthcoming 2007). She has been editor of the *Canadian Journal of Latin American and Caribbean Studies*, and is author of dozens of articles and book chapters on Mexico.







# Introduction

The challenge in creating a multidisciplinary work is to illustrate how various research subjects and approaches link to foster dialogue. At first glance it may not appear that these papers interrelate, but reading them in the order presented will reveal a logical discursive thread. This volume is structured so that the book progresses from a *macro* to a *micro* level of discussion, moving from debates on state-led visions of progress to analyses of their effects on communities and individuals. For the reader who is more interested in reading about local attempts to inform decision-making at the state level, it is useful to read the book in reverse. Regardless of how one chooses to approach these essays, they all contribute to *each other* and to the overall themes discussed.

As a nation-state that continues to progress as a strong power in the Americas, it is important to understand how Mexico will move forward with its neighbours in the North and South. Mexico has made every effort to integrate itself into the North American continent as an equal partner, yet Canada and the U.S. have been reluctant in their responses by comparison. In recent years, tensions have arisen among these three partners following a number of significant events: the election of President George W. Bush to office; the security concerns and resulting legislations passed following the September 11, 2001 terrorist attacks in the U.S.; the debates that continue concerning illegal migration from Mexico to the U.S.; the heated 2006 presidential elections in Mexico with its highly contested results; and recently, concerns following the deaths of Canadian tourists in Mexico.

As the essays progress to a micro level, the focus shifts to how national and international discourses have affected communities at a grassroots level. Specific case studies illustrate how groups within a given society can achieve their own goals, working with or against greater nation-state building efforts. Mexico is a rich resource for the study of social movements and mobilizations and in this volume, specific experiences of indigenous communities are explored. As the subjects in the essays shift to focus on Mexico City, further support is given to the dialogue concerning how class, gender, race, culture, and ethnicity are implicated in nationalist discourses. It is crucial to take these factors into account in order to understand how historically (especially since the Mexican Revolution in the 20<sup>th</sup> century) efforts at building the Mexican

state and national identity have drastically transformed the livelihoods of the many diverse peoples within the country.

Ultimately, our hope is that this volume will illustrate just how complex and passionate the process of building the Mexican nation-state has been. An incredible effort has been made by the Mexican state to firmly establish itself as a powerhouse in the Americas, and as a distinct and important ally to the U.S. and Canada. Along the way, as these contributors have shown, the Mexican people have worked just as tirelessly, fighting to ensure that their own concerns and causes continue to inform the way in which their futures will unfold.







# Acknowledgements

It is amazing to think that three years have passed since our committee of six first sat down in our third year to discuss our visions for the realization of this ambitious project. After working through the intense and sometimes frenzied process of organising the symposium, it has been refreshing to finally have the time and space to reflect on the knowledge gained from our fall seminar and discussions on our symposium day, as well as on the experiences we had on our field research trips to Mexico in the summer.

How exciting it has been to take on this next challenge of creating a book! These papers represent years of research on Mexico, and have been entrusted to us by accomplished and dedicated Mexicanists. It has been an inspiration, as students and first-time editors, to engage in these areas of academic life and we are so grateful for what we have gained.

We extend our heartfelt thanks to Professors Elisabeth Abergel and Domenico Mazzeo for their advice and encouragement throughout this last phase of the project. To Professor Judith Adler Hellman, thank you for your insights and kind words. To Peter Castell, our sincerest thanks for lending your artistic talents and hours of dedicated work to our Committee.

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Thank you to Glendon's Principal, Dr. Kenneth McRoberts, and to Consul-General of Mexico to Canada Carlos Pujalte for their participation and support of our event and assistance with the field research trips. Thanks to Mr. Cuauhtemoc Villamar with the Consulate-General of Mexico, Mr. Rafael Cortés with Bancomext, Mr. Graeme Hamilton with DFAIT, and Mr. Michael Locke with Scotiabank for their enthusiastic work on our behalf.

We would also like to thank a number of individuals who facilitated the smooth and professional course of our symposium day. Our thanks to the panel moderators: Ms. Carmen Sanchez, Mr. Jose Luis Atristain, Dr. Eduardo Canel, Dr. Edward Silva, Dr. Colin Coates, Dr. Elisabeth Abergel, and Dr. Margarita Feliciano. A special thanks to our photographer, Dylan Neild, our film editor, Michael Caldwell, and staff coordinator, Charmaine Bene.

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This has been an emotional, life-changing experience that pushed all of our limits; we would like to thank, from the bottom of our hearts, our friends and loved ones for their moral support and love that was always appreciated.







# Addressing Trans-Border Migration and Development

David A. Shirk

*Note: This paper synthesizes points developed in a research brief co-authored with Robert Donnelly for the Trans-Border Institute at the University of San Diego. The author would also like to thank Theresa Firestine for her able assistance with maps and data. Any errors of fact, argument, or omission are strictly attributable to the author.*

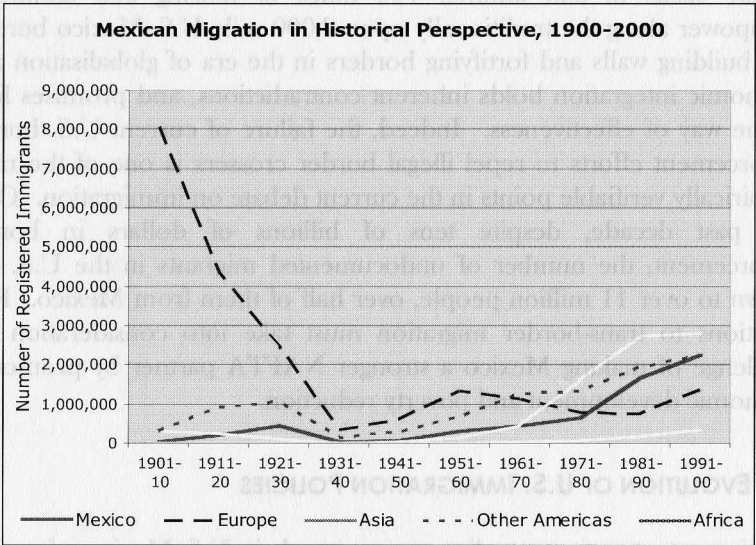
Recent legislation passed in the U.S. House of Representatives and Senate seeks to add another 700 miles of fencing and additional manpower along the traditionally open 2,000 mile U.S.-Mexico border. Yet building walls and fortifying borders in the era of globalisation and economic integration holds inherent contradictions, and promises little in the way of effectiveness. Indeed, the failure of current U.S. border enforcement efforts to repel illegal border crossers is one of the most empirically verifiable points in the current debate on immigration. Over the past decade, despite tens of billions of dollars in border enforcement, the number of undocumented migrants in the U.S. has grown to over 11 million people, over half of them from Mexico. Real solutions to trans-border migration must take into consideration the challenge of making Mexico a stronger NAFTA partner by promoting economic development and poverty reduction.

## THE EVOLUTION OF U.S. IMMIGRATION POLICIES

It is important to contextualize current trends in U.S.-Mexico migration. When we look at the multiple waves of migration to the U.S. over the past two centuries, there are two peaks that have both coincided with major expansions of the global economy. The first major wave of U.S. immigration — peaking around 8.8 million people from 1900-1910 — was comprised almost entirely of Europeans. Irish, German, Polish,

and Italian immigrants dominated previous diasporas to the U.S., as they fled hardships in the Old World and sought a better life in the United States. In their search for opportunities, however, virtually every major wave of migrants struggled against a backlash of xenophobia and nativist fears of group competition in the U.S. Their collective experiences point to a frequently unacknowledged aspect of U.S. political culture, which is that entering the “melting pot” implies that new immigrant groups often undergo a trial by fire to “assimilate” and become “Americans.”

It is also worth noting that — in the midst of a major wave of European migration to the U.S. in the early half of the 19<sup>th</sup> century — most migration between the U.S. and Mexico was from the former to the latter, as U.S. nationals entered Mexican territory with thinly-veiled separatist notions. Then, after the 1846-48 U.S.-Mexican war, there was an exodus of Mexicans returning across the border that had crossed *them*. Meanwhile, for the remainder of the 19<sup>th</sup> century, discriminatory U.S. migration policies discouraged or otherwise restricted non-European migration, especially in the case of Chinese and other Asians seeking opportunities in the Americas.



Source: “Immigration by Region and Selected Country of Last Residence, Fiscal Years 1820-2001,”

Immigration and Naturalization Service.

At the turn of the 20<sup>th</sup> century, U.S. immigration policies became much more restrictive, particularly in response to new waves of Eastern European immigrants. Overall, however, the point is that U.S.

immigration policy has been historically coloured by nativist and even racist anxieties, at least until the 1960s. Thereafter, the civil rights movement led to a major shift in U.S. immigration policy, with the goal of establishing fair quotas regardless of race (and an emphasis on prioritizing family reunification as a determining factor in visa processing). Over time, the system that has evolved has proved one of the most liberal immigration policies in the world, and has allowed generation after generation of migrants to contribute their skills and culture to the fabric of the United States. Thanks to this shift in U.S. immigration policy, over the last three decades there have been major increases in legal migration from non-traditional sources in Asia and the Americas.

Still, U.S. immigration quotas were ultimately unable to keep up with worldwide demand for visas, especially during the so-called “lost decade” of the 1980s when many Latin American countries were plagued by severe political and economic crises. Hence, would-be migrants who were unable to obtain visas simply entered the U.S. and sought jobs without documentation. This was especially true for Mexico, where for many years migration to the U.S. functioned almost as a pressure-release valve to alleviate economic crises and prevent domestic political discontent. For this reason, many Mexican politicians have tended to view unauthorized immigration rather benignly, if not outright permissively. Indeed, past Mexican administrations seemed to reject out of hand any collaboration with U.S. migrant-containment strategies, and Mexican officials frequently cited the constitutionally sanctioned freedom of mobility to excuse themselves from collaborative efforts to stem illegal border-crossing attempts.

In any case, by 1986 the number of undocumented immigrants in the U.S. was so great that U.S. policymakers opted for a major immigration policy reform by granting most long-time undocumented residents amnesty and a chance to obtain U.S. citizenship. In addition, this new legislation – known as the Immigration Reform and Control Act (IRCA) – brought calls for increased border security to prevent unauthorized entry into the U.S.

However, without significantly increased quotas, demand for visas continued to outmatch the supply, and undocumented migration continued; only now it was fuelled by the personal networks of newly legitimized immigrants with would-be migrants from their home countries. By 1990, Senator Alan Simpson (R-Wyo.) proclaimed: “Uncontrolled immigration is one of the greatest threats to the future of this country.” In the next few years, the prospect of a major economic agreement between Canada, Mexico, and the U.S. – the North American Free Trade Agreement (NAFTA) – heightened concerns

about a “NAFTA Train” of undocumented immigration and organized crime moving across the U.S.-Mexico border. Hence, in the early 1990s, U.S. officials began an aggressive effort to stem the flow of unauthorized migration and illegal drugs into the country by developing a strategy of “concentrated border enforcement.”

## **THE FAILURE OF CONCENTRATED BORDER ENFORCEMENT**

Beginning in 1994, U.S. officials initiated a series of unilateral initiatives — from Operation “Hold the Line” (also called the “Blockade”) in Texas, to Operation “Gatekeeper” in San Diego — that focused on enhancing border security primarily by establishing fencing, increasing the presence of border patrol personnel, and introducing lighting and high-tech surveillance equipment in major populated centres along the U.S.-Mexico border. The immediate impact of these initiatives was to accomplish a considerable degree of order in the areas where border enforcement measures were concentrated. However, because the U.S. government simultaneously relaxed interior enforcement — that is, the use of workplace inspections and apprehensions of unauthorized residents living within the U.S. — those undocumented migrants who continued to flow through the border in unprotected areas and by other means were able to find employment without serious obstacles. In other words, while raising the hurdles for unauthorized entry, U.S. immigration control strategies during the 1990s and into the next century ultimately failed to deter undocumented immigration.

In the final analysis, efforts to secure the border over the past decade have accomplished basically three things. First, while largely undiminished, undocumented migrant flows have been rerouted overland through dangerous desert and mountain areas, underground through sophisticated tunnel systems, and overseas along open U.S. coastal areas. Some experts have referred to this trend as the “balloon effect,” since the tightening of enforcement measures in certain areas has simply caused migrant flows to bulge in other segments of the border region, with major crossing routes shifting from California and Texas to Arizona. Still, the increases in border enforcement — especially after the 9/11 terrorist attacks — has effectively raised the costs and difficulties of land-based entry to the U.S. This has had the secondary effect of breaking traditionally circular or cyclical patterns of migration, whereby migrants travelled across the border seasonally or during economic crises to work in the U.S. and later returned to their home communities. As U.S. border controls have grown tougher, migrants are less inclined to return home on a seasonal or cyclical basis, and instead have opted to



reside permanently in the U.S. Thus, ironically, the implementation of tougher border controls has unintentionally contributed to a greater tendency toward long-term unauthorized residency.

Second, as undocumented migrants have sought to avoid the perils of desert and mountain crossings, there has been a proliferation of people smuggling, document fraud, and visa overstay. Seeking to avoid detection at the border, undocumented persons increasingly rely on professional smugglers (*“coyotes”* or *“polleros”*) to transport them across the border.<sup>1</sup> Such “professional” smugglers charge exorbitant rates (averaging around \$1,500 USD), often financed by a migrant’s friends or relatives already residing in the U.S., and are well positioned to take advantage of their customers.<sup>2</sup> Meanwhile, for many migrants another path to unauthorized entry or residence in the U.S. is made possible by the ready availability of false documentation (fake driver’s licenses, social security cards, and the like) that can be used to secure employment and a semblance of citizenship.<sup>3</sup> Also, as many as one-third of all unauthorized residents living in the U.S. are estimated to have fallen into unauthorized status by overstaying their visas after entering the country legally.

Finally, as a result of the new dangers involved in land-based crossings, too many migrants crossing in the border’s scorching deserts and formidable mountainous regions suffer a horrible fate, with thousands dying in the process over the past decade. At the October close of the Border Patrol’s fiscal year for 2006, an estimated 4,045 migrants had died of extreme temperatures and other hazards at the border since 1995. A record 472 of those lives were lost in the 2005 fiscal year, while the number dipped approximately 5% in fiscal year 2006 along with overall unauthorized flows during the same period.

For their part, U.S. lawmakers could be much more effective at averting these trends if they simply stopped turning a blind eye to employers who hire undocumented workers. While many truly

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1 A study by the National Foreign Intelligence Board reports that illegal migration is “facilitated increasingly by alien-smuggling syndicates and corrupt government officials.” National Foreign Intelligence Board, *Growing Global Migration & Its Implications for the United States* (3 March 2001). Available at: <[http://www.dni.gov/nic/PDF\\_GIF\\_otherprod/migration.pdf](http://www.dni.gov/nic/PDF_GIF_otherprod/migration.pdf)>.

2 Smugglers fees can be much greater than the average. In one case reported by the New York Times: “Government officials said they were deporting 319 illegal migrants, mostly from Ecuador, who had been detained by Mexican and U.S. Navy ships in the Pacific Ocean. The migrants were traveling on two fishing boats stopped in separate incidents off the coast of Chiapas, in Mexico’s south. Officials said the migrants had paid smugglers as much as \$4,000 each to help them travel through Mexico to the United States.” See Tim Weiner, “World Business Briefing Americas: Mexico: Migrants Being Deported,” New York Times, 12 Dec. 2002.

3 Most U.S. citizens rely primarily on official identification issued by state governments — because civil libertarians and individual privacy rights groups strongly oppose the creation of a national identity card — since there is no mandatory system of national identification within the U.S.

innocent employers surely hire undocumented workers only unwittingly (thanks to false papers), most do so with a wink. Such employers reckon that they need the labour, and really do not have the means (or the obligation) to enforce the government's immigration laws. Not surprisingly, cracking down on employers (read "campaign donors") has not been a popular idea among elected officials for some time. Moreover, doing so could actually negatively impact U.S. consumers (who benefit from lower prices made possible by low-wage migrant labour).

Instead, policy makers have focused on the prospects for a comprehensive immigration reform — such as the so-called Kennedy-McCain initiative in the U.S. Senate — that would create a migrant guest worker program to liberalize labour flows between Mexico and the U.S. Critics of migrant guest worker programs raise various concerns (unacceptable workplace conditions for migrants, lower wages for native workers in affected industries, and no certainty of averting undocumented migration), and past experience suggests that such programs primarily address the needs and interests of the receiving country, rather than promoting economic development in the sending country.

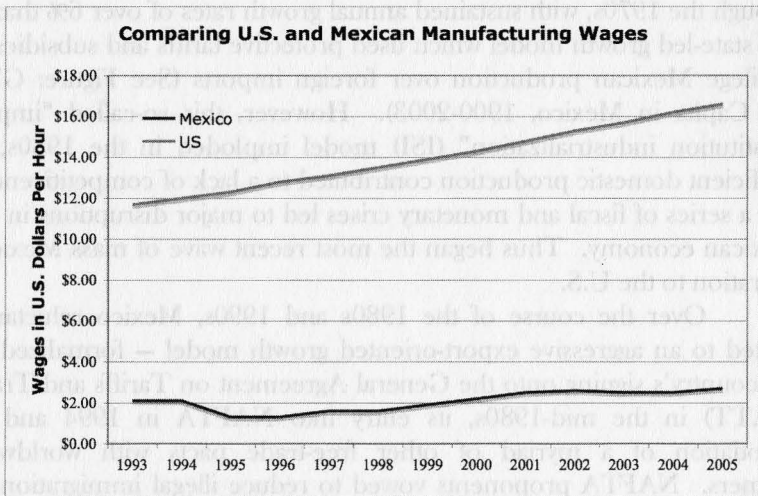
Moreover, guest worker programs do not necessarily prevent visa overstays or undocumented immigration outside of established quotas for temporary employment. Canada, which currently admits approximately 20,000 seasonal migrant labourers from Mexico and the Caribbean through its guest worker program, continues to have an estimated 400,000 undocumented migrants residing in the country. Thus, to address undocumented migration, both Canada and the U.S. would benefit from looking at what gains could be made through a more concerted effort to promote development in migrant sending communities.

In the end neither border enforcement, nor workplace raids, nor guest worker programs can really address the crux of the problem. While U.S. demand for Mexican labour is a significant part of the equation, as long as millions of Mexicans face difficult economic circumstances in their own communities there will be massive pressure to seek better opportunities elsewhere. In short, the true limitation of U.S. immigration and border enforcement policy has been a failure to recognize the major causal factors driving migration from Mexico, and the urgent need to promote economic development to help benefit migrant sending communities.

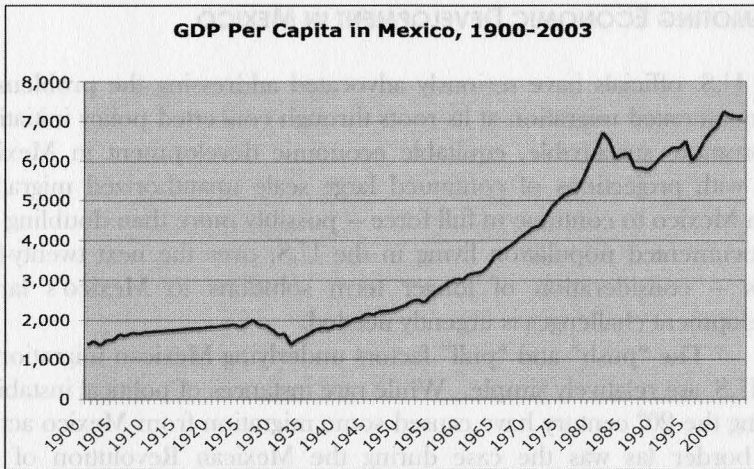
## PROMOTING ECONOMIC DEVELOPMENT IN MEXICO

Few U.S. officials have seriously advocated addressing the problem of undocumented migration at its roots through concerted policy initiatives to promote sustainable, equitable economic development in Mexico. Yet, with projections of continued large scale unauthorized migration from Mexico to continue in full force — possibly more than doubling the undocumented population living in the U.S. over the next twenty-five years — consideration of longer term solutions to Mexico's larger development challenges is urgently needed.

The “push” and “pull” factors underlying Mexican migration to the U.S. are relatively simple. While rare instances of political instability during the 20<sup>th</sup> century have caused some migration from Mexico across the border (as was the case during the Mexican Revolution of the 1910s), the primary “push” factor has been economic instability and lack of employment opportunities. As tough times have pushed Mexicans to migrate in search of jobs — and with significant U.S.-Mexico wage differentials (See Figure: Comparing U.S. and Mexican Manufacturing Wages) — the strong performance of the U.S. economy has “pulled” Mexican workers into the U.S. in search of better employment and earnings.



Source: Mexico Watch <<http://www.latinintel.com>>.



Source: Mexico Watch <<http://www.latinintel.com>>.

Many U.S. citizens may wrongly assume that higher levels of poverty and lower levels of development in Mexico have maintained a steady stream of humanity across the border. Yet, historically, migration — along with Mexico's levels of poverty — has ebbed and flowed along with the significant booms and busts in the Mexican economy. Moreover, Mexico's economy grew quite strongly from the 1940s through the 1970s, with sustained annual growth rates of over 6% thanks to a state-led growth model which used protective tariffs and subsidies to privilege Mexican production over foreign imports (See Figure: GDP Per Capita in Mexico, 1900-2003). However, this so-called "import substitution industrialization" (ISI) model imploded in the 1980s, as inefficient domestic production contributed to a lack of competitiveness, and a series of fiscal and monetary crises led to major disruptions in the Mexican economy. Thus began the most recent wave of mass Mexican migration to the U.S.

Over the course of the 1980s and 1990s, Mexico reluctantly shifted to an aggressive export-oriented growth model — formalized by the country's signing onto the General Agreement on Tariffs and Trade (GATT) in the mid-1980s, its entry into NAFTA in 1994 and its negotiation of a myriad of other free-trade pacts with worldwide partners. NAFTA proponents vowed to reduce illegal immigration by bringing the Mexican economy up to "First World" standards, primarily by expanding the country's manufacturing base. "We want to export products, not people," said then-Mexican President Carlos Salinas de Gortari as negotiations were taking place in the early 1990s. Certainly, Mexico's macroeconomic shift brought some definite benefits and helped to sharpen the country's investment profile among developing

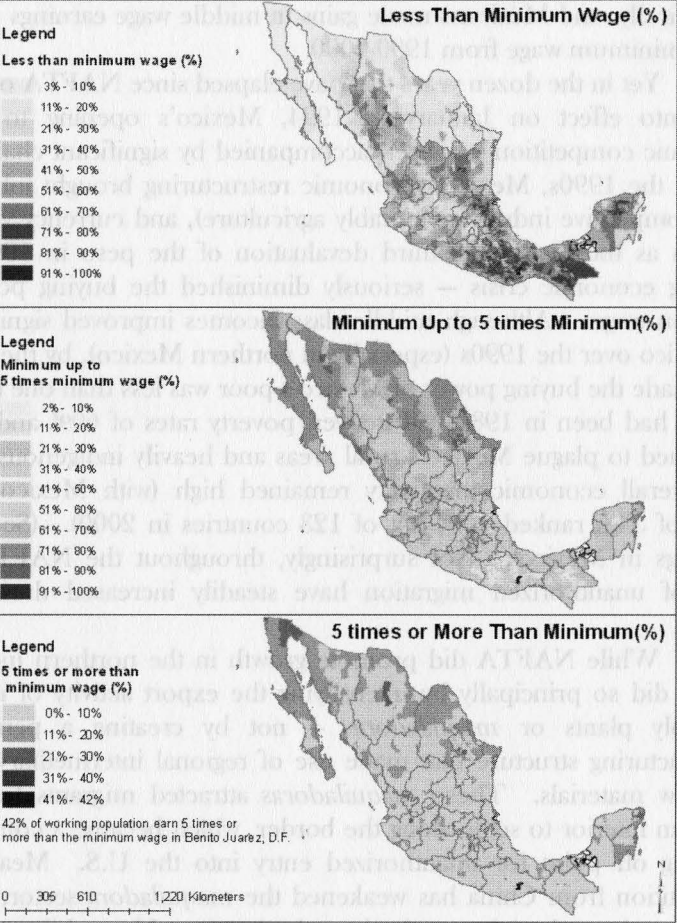


nations. Overall, trade between NAFTA countries increased dramatically, and Mexicans made gains in middle wage earnings relative to the minimum wage from 1990-2000.

Yet in the dozen years that have elapsed since NAFTA officially went into effect on January 1, 1994, Mexico's opening to global economic competition has been accompanied by significant challenges. During the 1990s, Mexico's economic restructuring brought job losses in uncompetitive industries (notably agriculture), and currency volatility — such as the nearly one-third devaluation of the peso in 1994 and ensuing economic crisis — seriously diminished the buying power of Mexican wages. Although middle-class incomes improved significantly in Mexico over the 1990s (especially in northern Mexico), by the end of the decade the buying power of Mexico's poor was less than one third of what it had been in 1980. Moreover, poverty rates of 60% and above continued to plague Mexico's rural areas and heavily indigenous south, and overall economic inequality remained high (with Mexico's Gini index of 54.6 ranked 109<sup>th</sup> out of 123 countries in 2000). (See Map: Earnings in Mexico). Not surprisingly, throughout the NAFTA era, rates of unauthorized migration have steadily increased during this period.

While NAFTA did promote growth in the northern industrial belt, it did so principally by intensifying the export activity of in-bond assembly plants or *maquiladoras* — not by creating a permanent manufacturing structure that made use of regional intermediary goods and raw materials. These *maquiladoras* attracted migrants from the Mexican interior to settle along the border, which became a convenient jumping off point for unauthorized entry into the U.S. Meanwhile, competition from China has weakened the *maquiladora* sector, raising concerns about the job growth along the border. Meanwhile, over the last two decades, these challenges have been aggravated by lower-than-expected GDP growth, ineffective governance, rule-of-law challenges, and educational deficits, factors that exacerbated the difficulties of millions of potential Mexican migrants.

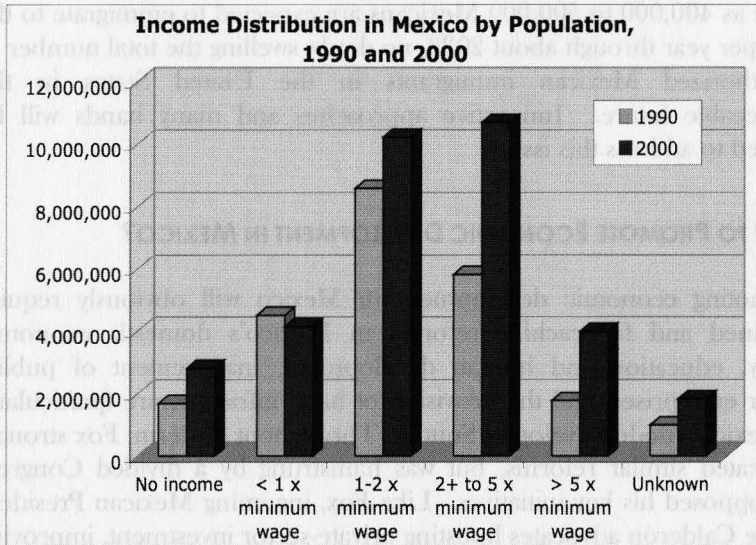
Earnings in Mexico Relative to Minimum Wage by Municipality.\* 2000



\*Includes all municipalities formed prior to 1996 and some formed during 1996 and 1997. Cross-hatched areas on map correspond to municipalities that were forming in 1996 and 1997.

Source: Earnings data from INEGI *XII General Population and Housing Survey 2000*.

Maps by TBI Research Assistant Theresa Firestone.



Sources: Income data from INEGI *Agenda Estadística* 2001.

Thus, when Mexico's long-time ruling party — the Institutional Revolutionary Party (PRI) — lost the presidency in 2000 to former Coca-Cola executive Vicente Fox, many hoped that his six-year term would bring much-needed change. In an attempt to promote economic development, President Fox experimented with a mix of public policy initiatives to improve governmental revenue (e.g., fiscal reform), infrastructure development (e.g., the Puebla-Panama Plan), and micro-economic solutions (e.g., micro-credit lending and the *Oportunidades* program). Moreover, his ambitious agenda for change sought to overhaul the Mexican justice system and improve education. However, Fox's domestic programs — hobbled by partisan divisions in Mexico's Congress, and attempted without full participation of Mexico's NAFTA partners — have met with only limited success.

Today, with roughly 40% of Mexican households still living in poverty (defined in Mexico as households earning less than \$5 USD per day), the supply of potential Mexican migrants seems enormous; certainly much greater than the 161,445 legal permanent resident immigrant visas granted by U.S. officials to Mexicans in 2005. Unless better employment opportunities and higher wages can be provided in Mexico, the overwhelming “push” factors that have driven recent migration will no doubt continue to influence prospective innovative approaches, and much cooperation by Mexico and the U.S. will be needed to address this issue. Indeed, according to the Mexican federal population agency (Consejo Nacional de Población — CONAPO), as

many as 400,000 to 500,000 Mexicans are expected to emigrate to the U.S. per year through about 2030, no doubt swelling the total number of unauthorized Mexican immigrants in the United States in the foreseeable future. Innovative approaches and many hands will be needed to address this issue.

## **HOW TO PROMOTE ECONOMIC DEVELOPMENT IN MEXICO?**

Promoting economic development in Mexico will obviously require sustained and far-reaching reforms in Mexico's domestic economic policy, education and human development, management of public-sector enterprises, and the provision of basic infrastructure (particularly in Mexico's underdeveloped South). Throughout his term, Fox strongly advocated similar reforms, but was hamstrung by a divided Congress that opposed his key initiatives. Like Fox, incoming Mexican President Felipe Calderón advocates boosting private-sector investment, improving Mexican education, building up infrastructure, and promoting fiscal reform in order to provide greater resources for government programs. Calderón may actually accomplish more in this regard than Fox did. Despite an extremely close (and highly controversial) presidential election in July 2006, the centre-right National Action Party (PAN) – the party of both Fox and Calderón – picked up seats in the lower house of Congress. Also, for the first time ever, the PAN became the dominant party in the Mexican Senate.

Striking a new deal with Mexico's now debilitated former ruling party (PRI) – which may be induced to support PAN initiatives in order to strengthen its own bargaining position – could enable Calderón to pass reforms that will help to bridge the gap between Mexico's haves and have nots. Indeed, if he hopes to have a mandate to govern, Calderón must do so with the fierce urgency of now. Anger over the closeness and perceived irregularities of the July elections has contributed to smouldering popular indignation among supporters of leftist candidate Andrés Manuel López Obrador, who lost by only less than 1% of the vote.

## **CONCLUSIONS: FINDING CONSENSUS ON MIGRATION**

In the intensely polemical debate on undocumented immigration to the U.S., two indisputable facts emerge. The first is that current U.S. border security initiatives have failed to stop undocumented immigration. The second is that more needs to be done address to the deeper underlying economic factors that contribute to large-scale



migration from Mexico. Many anti-immigration activists adopt a finger-wagging position, emphasizing the corruption and ineptitude of Mexican politicians. Yet, it is important to recognize that Mexico's troubles over the past two decades have to do in large measure with (the attendant disruptions brought on by) a macro-level shift in Mexico's economy and the emergence of a new globalised marketplace.

NAFTA, at least as it was originally envisioned, was intended to help usher in that new global era by bringing Canada, Mexico, and the U.S. economically closer together, and even reduce undocumented immigration. Unfortunately for Mexico, the deal entailed free flows of goods and capital, but not labour (its one area of comparative advantage). Moreover, opening to international trade entailed a massive restructuring of its economy, volatile currency fluctuations, deteriorated wages, and lost jobs.





# The Impact of Neoliberal Reforms and Mexican Emigration on the North American Labour Market

Richard Roman and Edur Velasco Arregui

## ABSTRACT

The labour market and labour movements of North America are being transformed by neoliberal reforms and free trade agreements that restrict labour rights and by the intensification of migration from Latin America that has resulted from these reforms. Precarious migration by Mexicans to North America and the shifting of production to Mexico are exerting a downward pressure on the labour market and on working conditions in all three countries. Emigration from Mexico has not been lessened by these plant relocations as they are part of a package of neoliberal reforms that destroy more jobs and sources of livelihood in Mexico than they create. Wages and working conditions will continue to deteriorate and labour organisations to weaken throughout North America unless and until the labour movement develops new ways of organisation and struggle that are inclusive of all sectors of the labouring populations, are transnational, and challenge the new “free trade” systems of labour regulation.

## I. MEXICO AS A POOL FOR THE RESERVE ARMY OF LABOUR

In his classic text, “Structural Change in the New Economy,” the legendary president of the Federal Reserve Board of the U.S., Alan Greenspan, celebrated the most prolonged expansion in the history of the U.S. as a consequence of the irresistible power of competition and the growth of the efficiency of corporations: “States with more flexible labour markets, skilled work forces, and a reputation for supporting

innovation and entrepreneurship will be prime locations for firms at the cutting edge of technology.”<sup>1</sup>

Alan Greenspan’s comparison of the U.S. and Europe hails the unilateral control of labour market flexibility by corporations as the key to U.S. economic superiority. In elaborating the reasons for U.S. prosperity, he concluded:

An intriguing aspect of the recent wave of productivity acceleration is that U.S. businesses and workers appear to have benefited more from the recent advances in information technology than their counterparts in Europe or Japan. Those countries, of course, have also participated in this wave of invention and innovation, but they appear to have been slower to exploit it. The relatively inflexible and, hence, more costly labour markets of these economies appear to be a significant part of the explanation. The elevated rates of return offered by the newer technologies in the United States are largely the result of a reduction in labour costs per unit of output. The rates of return on investment in the same new technologies are correspondingly less in Europe and Japan because businesses there face higher costs of displacing workers than we do. Here, labour displacement is more readily countenanced both by law and by culture. Parenthetically, because our costs of dismissing workers are lower, the potential costs of hiring and the risks associated with expanding employment are less. The result of this significantly higher capacity for job dismissal has been, counter-intuitively, a dramatic decline in the U.S. unemployment rate in recent years.<sup>2</sup>

In the months after the signing of NAFTA, Greenspan was obsessed with its possible effects on prices and labour costs (Woodward). However, productivity increased at the same time that unemployment surprisingly decreased without provoking a shift in the balance of forces in the U.S. labour market in favour of workers. The problem was not insignificant given that labour costs represent 70% of the operating costs of the U.S. economy. The explanation of this surprising outcome is found in the greater insecurity of workers and flexibility of management in hiring and firing, which Greenspan so praised. Furthermore labour insecurity was rooted in an unusual scissor effect: the simultaneous presence of an accelerated rate of technological change and the incorporation of a pool of new workers in conditions of extreme vulnerability, the millions of Mexican workers who entered the U.S. labour market in those years. The Mexican crisis of 1994, from this perspective, was not a minor or insignificant factor in maintaining the general rate of profit of the U.S. economy. The U.S. economy had begun to experience a sharp scarcity of unemployed. This tight labour market had the potential of undermining labour discipline and contributing to an upward movement of wages. The Mexican crisis alleviated this problem by expelling millions of workers who replenished

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1 Greenspan 2000.

2 Greenspan 2000.

the reserve army of labour in the U.S. The Mexican crisis played an essential role for the growing U.S. economy. We will return to Greenspan and this issue in part IV.

A certain amount of unemployment is good for Capital, though bad for both employed and unemployed workers. A surplus of workers gives Business flexibility and leverage to exert a downward pressure on wages and benefits. Firms, sectors, and the economy as a whole have an uneven rhythm of production. Workers are needed at times and not needed at other times as the cycle rises and falls. Individual firms want workers when they need them but do not want to pay wages and benefits to the workers when they do not. A reserve supply of labour helps capitalism solve this dilemma. They can be hired and paid when needed, and discarded when not needed. The costs of their survival, until needed again, are externalised. The costs are passed on to the state (social safety nets, such as welfare or unemployment insurance) or to family and friends. Aside from the need to have workers when you need them (or else miss profit opportunities), Capital wants cheap, productive and disciplined workers. As well as creating an upward pressure on wages, labour shortages contribute to a feeling of independence and possible insubordination on the part of workers. Thus, from the point of view of capital, a reserve army of labour is important not only for having labour when it is needed, but also having the kind of labour that is wanted.

Capital can draw on domestic reserve armies of labour in certain periods, and women, especially victimised minorities, and regions with chronically high unemployment have often played this role. But these sources of surplus labour are not always available at the price and within the terms that Business is willing and/or able to pay, and, as citizens, they are entitled to a variety of rights. There are, therefore, special advantages to drawing on a labour reserve from abroad. The costs of producing this labour force – the raising and educating of children until attainment of working age – has been paid for by the other society. These immigrant workers are generally vulnerable due to economic needs, language barriers, and limitations on their legal rights within the host nation. They are more easily disposable when no longer needed. Those workers who toil in their home country for foreign or foreign-linked capital are also often denied citizenship rights because of the authoritarian structure of many of these regimes.

There are two processes through which Capital draws on external reserve armies of labour throughout the world. One is immigration. The other – made much more possible by developments in technology and trade agreements – is the global reorganisation of production to incorporate low wage zones. In the case of the U.S., the



two processes come together in the massive in-migration of Mexicans and Central Americans and the burgeoning of maquiladoras and Export Processing Zones. Many of the Mexicans come as undocumented workers, which makes them both legally precarious and restricts their entitlements to health care or education for their children. Their legal vulnerability and economic dependency facilitates their exploitation which, in turn, exerts a downward pressure on the demands of longer-term resident labour populations. The participation of Mexican nationals in the U.S. labour force and in the society at large has always been a source of great controversy. But the long, shared border with Mexico has provided a partial alternative to having foreign workers resident in the country. This alternative, the relocation of part or all of the production process to cheap labour areas, was not a totally new strategy. It did, and continues to take place within, as well as between, nations across the world.<sup>3</sup> But the border of a first-world country with a third-world country created even steeper wage and other associated costs of production incentives that were even more dramatic. It also facilitated and facilitates wage and work discipline within the U.S. by serving as a vivid threat – shape up, give up previous gains, or lose out on jobs.

These two processes, insecure immigration and plant relocation, are part of a broader package of neoliberal reforms aimed at increasing managerial power over labour. Other components of this package involve reducing the social net to put more pressure on people to work for less and making taxation levels more competitive with low tax regions and nations, which also means fewer funds for the social net. The privatisation of all things that can be turned into sources of profit, both public enterprises and public goods, such as water, are also part of these policies.

The investment guarantees in the various “Free Trade” agreements are aimed, in significant part, at creating a legally secure area in which the search for cheap and flexible labour could be safely deepened, regionalised, and/or globalised. Business interests have been the driving force for the creation of these treaties in their constant efforts to maintain or increase profits. Business responded to the crisis of the 1970s by developing more aggressive strategies towards labour. The neoliberal strategies are deliberate attempts to sharply increase the domination of capital over labour. They pre-date the trade agreements, which themselves seek to insulate these policies from tampering by governments or civil society in the future.

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3. Cowie 1999.



## **II. NEOLIBERAL REFORMS, ECONOMIC CRISES, DEMOGRAPHIC CHANGE, AND LABOUR MIGRATION: THE PUSH**

An understanding of the radical demographic change in the Western hemisphere is necessary in order to grasp the basis for the torrential force of this great wave of human migration. Economic crisis and restructuring provide the push for the emigration towards the U.S. But the dimension and power of this migration has its underlying basis in the demographic transformation of the Western hemisphere. There has been an inversion of the population ratio between the U.S. and Latin America from the beginning of the last century to the beginning of this century. Early in the 20<sup>th</sup> century, there were more people living in the U.S. than in all of Latin America. In 1914, the U.S. had a population of 100 million, while all of Latin America only had 80 million, and most of these lived in rural areas. Eighty-six years later, the numbers were dramatically reversed. Latin America had a population approximately double that of the U.S.: 500 million in Latin America and about 260 million in the U.S.

The rapid growth of the Mexican labour force, the several economic crises, the restructuring of the economy in a manner in which formal sector jobs have diminished, and the common border, accelerated migration from Mexico to the U.S. in the 1980s, 1990s, and the first years of the 21<sup>st</sup> century. The northern trajectory of Mexican workers has been both to the maquila border zones and over the border to the U.S. The rapid growth of the Mexican labour force combined with Mexico's economic crises has greatly increased unemployment and underemployment. The dramatic drop in real wages has pushed more family members into the work force. As well, cutbacks in social services and in subsidies to the agricultural sector are also pushing more and more Mexicans northward.<sup>4</sup>

As well, the promise of some employment, albeit at the bottom of the occupational ladder in the U.S., has continued to attract Mexican workers. This attraction has intensified as the wage differential between Mexico and the U.S. has grown with each peso devaluation and the ongoing fall of real wages in Mexico. There now also exists a self-sustaining labour recruitment social infrastructure based on generations of previous migrants and the physical contiguity of Mexico and the U.S. This self-sustaining system meshes with and is made possible by the

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4 As NAFTA opens Mexico up to more U.S. grain imports over the next decade, large numbers of Mexicans will be pushed off the land. Some writers expect the numbers to be in the millions in the first ten years of this new century.

embeddedness of this source of labour for sectors of U.S. industry.<sup>5</sup>

As Kearney has aptly stated it: "Foreign labour is desired, but the person in whom it is embodied is not desired."<sup>6</sup> This states well the divergence between the labour recruitment and regulation strategy of sections of Capital and the opposition of various sectors of society to the inclusion of the bearers of this labour power as fellow members of society. Conflicts over citizenship rights and the boundaries of society and nation become confounded with conflict over real or perceived economic interests.<sup>7</sup> The state, therefore, is involved not only in mediating and managing interest conflicts but also ideological and status concerns over the boundaries and ethnic character of society.

### III. HISTORY OF MEXICO-U.S. LABOUR FLOW

Mexican workers have long played a significant role in the U.S. economy. During World War I, when the U.S. faced labour shortages, the government adopted the Temporary Admission Program to import cheap Mexican labour for U.S. industry and agriculture. In the early 1920s and most dramatically, in the Depression of the 1930s, there were massive deportations of Mexicans by the U.S. government. Again, with labour shortages during World War II and the Korean War, the "Bracero Program" was enacted, again, to import Mexican labour. And again, in the period of 1954-1955, the U.S. government carried out its "Operation Wetback," in which approximately 3.7 million Mexicans were deported.<sup>8</sup>

5 The application of the concept of embeddedness as well as the notion of the self-sustaining migration process can be found in the work of Wayne Cornelius, Roger Waldinger, and Robert Smith. See Cornelius 1998.

6 Kearney, quoted in Jamie Peck 1996:10.

7 These issues are used as mobilizing issues in political struggles (e.g. Buchanan in the presidential primaries of 1996 and 2000, and also the anti-immigrant Bill 187 in California) building on the status, cultural, and economic anxieties of sections of the American population.

8 When Attorney-General Herbert Brownell Jr. ordered "Operation Wetback" in June 1954, he "cited the possible illegal entrance of political subversives as a chief reason for his action..." (Meier and Ribera 1993:189). While "approximately 3,700,000 undocumented returned to Mexico between 1950 and 1955, only 63,500 were expelled as a result of formal deportation proceedings. Many left the country 'voluntarily'" (Meier and Ribera 1990). The term "wetback" is a derogatory term used to label Mexicans by U.S. whites, especially in the Southwest. The term refers to an image of Mexicans crossing the Rio Grande River, the border between Texas and Mexico. As late as 1951, the President's Commission on Migratory Labour in American Agriculture said in its Final Report: "The wetback is a Mexican national who, figuratively, if not literally, wades or swims the Rio Grande. Whether he enters by wading or swimming, crawls through a hole in a fence, or just walks over a momentarily unguarded section of the long land border, he is a wetback. Since he enters by evading the immigration officers, he is, in any event, an illegally entered alien. The term wetback is widely accepted and used without derision; hence for convenience, it is used here." Quoted by David M. Reimers 1992:58. The argument that this

There was a diminished flow of immigration for the next ten years (1955-1965) but it picked up steam again in the second half of the 1960s and even more so since the 1970s. The density of community and family links between Mexicans on one side of the border and Mexican-Americans and Mexicans on the other side create powerful networks for cross-border labour mobility. The deep crises of the Mexican economy since the 1970s as well as the devastating neoliberal restructuring have intensified the push out of Mexico. The insatiable desire of U.S. employers for cheap and vulnerable labour has produced powerful pressure groups for loopholes in policies intended to regulate or stop undocumented immigration.<sup>9</sup> The very programs meant, in part, to contain Mexicans in Mexico stimulate further migration. The *maquila* program, for example, attracts workers from other regions of Mexico to work in the frontier. Work in the *maquilas* enhances transferable skills, intensifies awareness of the great differences in wages on both sides of the border, familiarises people with the border region, as well as brings them to the edge of the "First World" (Sassen, 1996). The ongoing tension over immigration policy and job protection has led to a variety of measures and legislation, including the increasing militarisation of the border.<sup>10</sup> Nevertheless, the demographic pressure, the economic disparities within Mexico and between Mexico and the U.S., the desire of Capital for cheap labour, as well as the desire for a reserve army of labour to use as leverage for more general wage and work discipline, make the immigration flow uncontainable.

The U.S.-Mexican labour market grew significantly in the post World War II years and even more sharply in the last thirty years. The *maquila* program did not deter it but, in fact, acted in a complementary manner. NAFTA was politically promoted in the U.S., in part, as a way

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pejorative term was used without derision shows the depth of racist attitudes in these discussions.

9 The "Texas Proviso" provides a good example of the effectiveness of the agribusiness lobby. President Truman and the American Federation of Labour sought to pass legislation in the early 1950s to outlaw the employment of undocumented immigrants. But "Senator James Eastland of Mississippi, a staunch supporter of the national origins quotas and limited immigration and an opponent of refugee bills like the Displaced Persons Act, was tolerant about admitting undocumented aliens. He insisted the Douglas amendment (to make the employment of undocumented aliens illegal-EV/RR) was 'unfair to the farmer or the Mexican involved.' The law that was finally passed "made it a felony instead of a misdemeanor to wilfully import, transport or harbour illegal aliens... The law specifically said that employment of undocumented workers did not constitute 'harbouring'." "The exception, known as the Texas Proviso, indicated a clear victory for the growers." In Reimers 51-52.

10 Andreas 1998; Dunn 1996. In 1982, the INS carried out "Operation Jobs" (its label) which was aimed at removing undocumented workers from "high paying jobs" in order to make these jobs available to Americans. Raids were carried out in nine cities largely aimed at Hispanic citizens, mainly Mexicans. These were ineffective and challenged by civil rights and civil liberties groups, and, finally, suspended. (Meier and Ribera 191).

of stopping the undocumented immigrant flow. It does not allow for the free flow of labour. Nevertheless, it helps complete the integration of Mexican labour into the U.S. labour market. For while NAFTA makes all of Mexico a maquila zone, some production still must take place closer to consumers and less mobile capital in the U.S. needs to continually lower its labour costs to compete with goods now entering more and more freely from Mexico. A great volume of Latino workers have moved into fundamental sectors of the U.S. labour market to do this work that cannot be readily relocated. Latino workers are very important in specific sectors, both labour intensive and high tech.<sup>11</sup>

#### **IV. MIGRATION, POVERTY, AND THE DOWNWARD HARMONISATION OF THE U.S. LABOUR MARKET**

As the previous section has shown, the tremendous role of immigrant labour in the development of U.S. capitalism is not new. And Mexico has always been an important source. But the importance of Mexico specifically – and Latin America more generally – has mushroomed. Mexican labour on both sides of the border has become increasingly important to U.S. capitalism. It can be estimated that one of three employed Mexican nationals are employed in the U.S.<sup>12</sup> And one of four industrial workers in Mexico are employed in maquilas. Large-scale immigration to the U.S. remains one of the highest migration flows in the world.<sup>13</sup> Of the 6.8 million legal immigrants who came to the U.S. from 1990-1995, roughly 38% were from Latin America. Of the vast number of non-legal immigrants in the U.S., a 1992 report indicates that two out of five were Mexican, and two out of three were Latin American. If we add seasonal workers to legal and non-legal Mexican

11 The sunbelt boom and its expanded low-end manufacturing and service job base were significant factors in the demand for Mexican labour. By 1990, 37% of young Mexican immigrant men and 59% of young Mexican immigrant women were employed in manufacturing, overwhelmingly in direct production tasks. (Vernez and Ronfeldt 1991). Other studies show that these workers were employed not only by labour-intensive traditional industries (e.g., shoe and garment manufacture, construction) but also by high-technology firms with seemingly safe market positions (Cornelius 1989; Fernandez-Kelly 1983; González Baker et. al. 90).

12 Velasco and Roman 49.

13 The population of the U.S. grew from 248.1 million in 1990 to 261.1 million in 1995, an increase of 13.5 million people in five years (the U.S. increase in those five years was equal to about half of the total population of Canada in the same period). The rate of population growth "by natural increase" was 1.1% in rounded figures. Official statistics show that there were 6.8 million legal immigrants in this period, which implies that 50% of the absolute population growth of the U.S. can be attributed to the flow of immigrants from other countries. (U.S. Statistical Abstract, 1996, pp. 8-18). The volume of legal immigrants in 1994 was 804,000. Of this 804,000, 38% or 304,000 came from Latin America; 292,000 from Asia; 161,000 from Europe; 26,000 from Africa; and only 20,000 from Canada, Australia, and New Zealand.



residents of the U.S., we can say that approximately 10 million Mexican nationals live in the U.S. for part or all of the year.<sup>14</sup>

The new waves of Mexican migrants are being incorporated into an economy that is being re-organised for cross-national production in a neoliberal framework. Production is being disaggregated and integrated continentally. This has profound implications for the incorporation of immigrants into the labour force. Earlier waves of European immigrants made economic gains through political and trade union struggle in the context of an expanding U.S. economy. These opportunities, however, were generally blocked for Latinos and Blacks through the practices of institutionalised racism, which ghettoized them in job sectors of lesser opportunity. However, while the job ghettoization of Latinos and Blacks persists, the character of the expansion of the economy is radically different: it is an expansion based on a systematic attack on wages, job security, and working conditions. The opportunity structure for advancement through immigration has shrunk as the labour market has been harmonised downward in the name of international competitiveness. This deterioration of the labour market is produced both by corporate and government policies (welfare reform, anti-union policies). The sectors in which immigrant labour is concentrated have been the most vulnerable to the threat and practice of job relocation, restructuring, and downsizing.

This transformed job structure (jobs relocated to Mexico, downsizing, casualisation, etc.) is not only the entry point for the new waves of Mexican immigrants but also the location of the previous waves of immigrants and the Mexican-American population. They remain concentrated in the low end of the employment structure, in the jobs

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14 The importance of Mexican and Latin American migration for the growth of the U.S. labour force becomes more sharply visible if we add non-legal immigration to the legal. The INS (Immigration and Naturalization Service of the U.S. government) estimated that there were between 3.4 and 4 million undocumented workers in the U.S. However, there are indications that the real number is much higher, perhaps around 6 million people, who live submerged in an underground social and labour world within the U.S. If we extrapolate from the study, *Migration Between Mexico and the United States*, we would see that the number of undocumented immigrants of various nationalities is quite underestimated in the official figures. The 1992 study referred to above shows only 3.4 million undocumented immigrants, of whom 1.3 million are of Mexican origin. But the study shows that the real numbers of undocumented workers, permanent and temporary, in the U.S. economy is actually much higher. In fact, it may have reached 6 million in the second half of the 1990s, e.g. 5% of the economically active population of the U.S. By the end of the century, these figures could increase to 8 million or 6.3% of the economically active population of the U.S. Whichever set of figures is more accurate, the growth of the Latino labour force in the U.S., of which Mexicans are the majority, has been and will continue to be enormous. Latino workers have been predicted to have reached 27% of the U.S. labour force this year. And, by 2004, it has been predicted that Latina workers will outnumber female "Anglo"/white workers (Zaragoza Vargas 243). The above projections do not include the 3 million Puerto Ricans in Puerto Rico.



most vulnerable to relocation and therefore also to the effective use of the threat of relocation. Thus, the new entrants and the various layers of previous immigrants and Mexican-Americans are being compressed together at the bottom end of a job structure, which itself is being transformed in a downward direction.

The presence of 11 million Latino/a workers in the U.S. labour market coincides with the destruction of the old social contract of the post-war period. As well, it takes place in a very different context than early 20<sup>th</sup> century immigration. Immigrants then, as now, generally concentrated in certain niches. When the economy expanded, these immigrants and their children could move out into other areas or make gains in these expanding job niches. But now, the expansion of capitalism is not producing better opportunities but a worse and more casualised labour market. The job niches being carved out are shrinking because of downsizing and relocation to Mexico, among other places. Thus the recent immigrants, the 1.5-generation immigrants (those born abroad but raised in the U.S.), and the second-generation are finding their prospects very bleak. The combination of the persistently large immigration flow with the deteriorating job market bodes ill for the immigrants and their children. As one author has put it: "If the niche shrinks while the numbers entering it grow, conflict and downward mobility will result."<sup>15</sup>

The combination of a deteriorating labour market with the systematic assault on organised labour has made U.S. labour very weak.<sup>16</sup> This assault has been carried out both by companies and governments through legislation and practices that have made union

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<sup>15</sup> Smith 151.

<sup>16</sup> It is more than coincidental that immigrants amass in cities of declining unionization. Jobs are still present in these cities — though these are old jobs that have been downgraded or new, low end jobs. Weak and declining unions find it difficult to organize new workers, immigrant or non-immigrant. The lack of organisation and clout undermines resistance to the replacement of union jobs with non-union jobs through restructuring, contracting out, etc. In this context, the mass of new workers can be used to beat down wages and working conditions and further weaken unionism. Job protection through exclusionary strategies is not viable in this new situation of the continentalisation of the labour market and globalization of production. New York City had a unionization rate of 38% in 1983, but this declined to 25% in the 1990s. Chicago declined from 25% to 18% in this period and Los Angeles from 22% to 15%. Unionized workers in cities with large Latino populations are mainly composed of small groups of federal public employees who have unionization rights by law, while the rest of the labour force lacks union organisation. The rate of unionization is 9% in Miami, 7.2% in El Paso, 7% in Houston, 6.8% in Dallas, 6.5% in Phoenix, 5.9% in San Antonio, and 3.6% in Austin, Texas. If we exclude the public sector and focus on the 110 million workers in the private sector, the rate of unionization in the U.S. falls below 10%. This is a dramatic decline from the 35% rate at the end of World War II. Thus, most U.S. workers lack the organisation to bargain collectively over their conditions of employment. But, in the case of Latino workers, the low rate of unionization, 12%, has a devastating effect on salaries. The combination of falling salaries and the slow but continuous rise in productivity has polarized income as never before in U.S. history.

organisation, collective contracts, and strikes almost impossible in various parts of the U.S. As well, the weakness of U.S. labour is a result of the inability of traditional unionism to effectively confront these attacks. These conditions facilitate the use of mass immigration as a way of lowering the wage bill and disciplining the whole of the working class. It is not immigration per se that weakens unions and the position of workers in the labour market.<sup>17</sup> It is the inter-connected combination of these labour market changes and both the weakness and the strategies of U.S. unions that permit the demeaning treatment of undocumented workers and the general deterioration of conditions of work.

Returning to Alan Greenspan's argument, we can see that one important result of the Mexican crisis of 1994 was that the tendencies in the Mexican and U.S. labour markets criss-crossed. Whereas the reserve army of labour of the U.S. decreased continuously in the following thirty-six months from 9.6 million to 6.2 million unemployed, the mass of unemployed in Mexico rose from 2.8 million to 4.6 million.<sup>18</sup> 40% of Mexicans and Central Americans continued to have incomes below the poverty line, another 17% had gross incomes that oscillated around the poverty line, and only 15% were involved in work that gained them incomes two times the poverty line. The 1994 Mexican crisis, in one fell swoop, produced millions of newly unemployed workers. The incorporation of this surplus labour force into the U.S. labour market, without labour rights or union organisation, was fundamental for the prolongation of the profitability of U.S. corporations over the next four years.

This absorption of a major part of Mexico's surplus labour force by the U.S. economy took place through two mechanisms. The

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17 As mentioned above, it is not immigration per se that causes a deterioration of living and working conditions of wage earners. Earlier waves of European immigrants were able to experience rising wages and living conditions in the generally expansive U.S. economy of the 20<sup>th</sup> century. These objective conditions, along with the struggles of immigrant and non-immigrant workers through their unions led to the winning of rights as well as better wages and conditions. Management, in some sectors, found it necessary and possible to live in friendly or hostile coexistence with collectively organized workers. The relative strength of unions in these conditions allowed for the sometimes successful collective defence of workers' rights. Thus, the impact of immigration on the workforce depends on the structural changes going on in the economy (type of expansion or contraction), the size and character of the immigration, the strength of collective organisation of the working class (unions), and the stance of unions toward the acceptance or rejection of immigrant workers. The key is the manner in which immigrant workers are absorbed into the labour force and working class culture and institutions. The manner of absorption depends on several things: the state of the labour market (declining/expanding/changing), the strength of unions, the stance of unions (fraternal-welcoming, racist-excluding), labour legislation and enforcement (anti-racist or facilitating racial segmentation, allowing sub-standard conditions, or enforcing minimal labour standards — thereby reducing the opportunity and incentive to use immigrant labour as a cheap labour force and lever to drive down labour standards in general).

18 Anuario Estadístico de los EUM 2002:223.

first was the significant expansion of the maquila industry during the second half of the 1990s. The second was the massive migration of Mexican workers to the U.S. In both instances, the absence of the rights of association and collective bargaining were fundamental in preserving the low salaries of the recently arrived in the workshops and factories on both sides of the Rio Grande/Rio Bravo. The real and potential presence of Mexican workers in the continentally integrated manufacturing process of U.S. industry, without socio-political rights or unions, created the conditions for intimidating U.S. and Canadian workers with the threat of plant closures and relocation.

The opening of the migratory floodgates in 1995 alleviated the labour shortage for the booming U.S. economy. For the migrants, it involved exchanging one kind of suffering for another. On one side of the border, the migrants had suffered the poverty of starvation, a palpable lack of food, and basic services for themselves and their families. On the other side of the border, their poverty rose to U.S. poverty levels but they had to endure the pitiless appropriation of their life energies and bodies in the machinery of U.S. production in order to keep themselves and their families from sinking below the poverty line. In the course of this exchange of suffering, they had also to endure the alienation of immigrants from their roots and the racism of their host country.

Some of the consequences of this deterioration in the labour market have been partially overcome by having many members of the family participate in the labour force. The cultural capacity to constitute extended family units – and the sacrifice of more and more living labour for lower and lower wages – has been the only way that Latino families have been able to pay the very high rents of U.S. cities. It is only by combining five or six salaries within extended families living in overcrowded single-family housing that makes the payment of rents possible that would be impossible to cover with a single salary. Latinos constitute a significant portion of the population of nine of the ten major metropolises in the U.S.

These developments have involved the deindustrialisation of the “Rust Belt” and the destruction of its unions as industry has been relocated to the Sunbelt of the U.S. south. The presence of 18 million Latino workers is coincident with the dismantling of the old, post-war social contract. Migration does not, in and of itself, produce a deterioration in the conditions of life and work of wage-earners. It did not do this in earlier periods of U.S. history. The effect of immigration depends on the general development of the labour market, the type of government regulation, and the strength of unions. Corporations have used immigration as part of a more general strategy to reduce salary

levels and increase flexibility. The corporate assault has combined the widespread use of immigrant labour with an attack on unions and workers rights and governmental regulation that obstructs unions and leaves undocumented workers without protection.

The great importance of Latinos, especially Mexicans and Central Americans, in the reserve army of labour (which we are defining, roughly, as those below the poverty line) can be seen in changes that have taken place between 1980 and 2003. The Latino segment of the reserve army of labour grew from 11% of the total number of poor people in the U.S. to 24% in this period, although they only made up 13.8% of the total population in 2003. Latinos have now slightly surpassed Afro-Americans within the reserve army of labour and, together, they have gone from being 41% of the reserve army of labour in 1980 to almost 48% in 2003. The immense majority of these poor Latinos are of Mexican and Central American origins. In spite of the (U.S.) economic boom of the 1990s, the number of poor Mexicans within the U.S. did not cease to grow, increasing from 3.7 million in 1990 to 5.4 million in 2000 and 6.2 million in 2003. Nevertheless, non-Latino "whites" still make up a majority of the reserve army of labour.

The last few years have seen a substantial growth in the number of both employed and unemployed Latinos, a seeming paradox that is explained by the magnitude of the migration to the U.S. This has been the case throughout the slow economic recuperation that began in 2002, during which the number of unemployed Latinos continuously grew to 20% of the total of unemployed workers, in spite of, simultaneously, gaining ground in the over-all labour market, as we will see later. At the other extreme from poor workers [Latino migrants, poor whites, and (the long term marginalisation of) Blacks] is the nucleus of the dominant class of U.S. capitalism, that 5% of the population that receives 22% of the national income of the U.S., that is, five million families with an average annual income over \$3 million USD.

Latino workers have become the majority within workers of colour. In a period of twenty years, their percentage of blue and white collar workers combined has gone from 7.8 % in 1983 to 20.1% (10.6 million) of these workers in 2004 while the Afro-American percentages have remained relatively unchanged, increasing from 13.4% to 13.8% (6.7 million) in the same period. Alongside Latino and Black workers, there is a growing portion of workers of Asian origins and the large majority of increasingly impoverished white workers. In line work and transportation, the percentage of Latinos of the whole labour force in that segment has gone from 8.3% to 19.2%, in construction from 6% to 25%, in hotel services from 10.1% to 38.2%, in building cleaners from 8.9% to 26.8%. One of five workers in the U.S. today is Latino and they



continue to be the most dynamically growing sector of the working class of the world's leading capitalist power.

## CONCLUSION

Neoliberal reforms in Mexico and in the U.S. have had a sharply negative effect on job opportunities, wages, benefits, and working conditions. They have been an important factor of the push of Mexicans to the U.S. And, in the U.S., these neoliberal reforms have meant that recent waves of Mexican immigrants are entering a labour market which is itself deteriorating. The combination of the increasing numbers of desperate migrants and a general downward push in the U.S. labour market creates conditions in which a scapegoating of the immigrants as the source of the deterioration is strongly possible. The alternative would be to see the neoliberal restructuring of the labour market as the source of the deterioration on both sides of the border and labour organisation and action as necessary to slow or reverse these policies. But this requires major changes in the labour movements of both countries. Workers and unions must aim for a unionism that is inclusive, emphasises solidarity rather than competition, and seeks to reverse the neoliberal policies that have been so hard on workers on both sides of the border.



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# Canada-Mexico Relations

## Presentation Text

Juan Bosco Martí Ascencio

I am delighted to be here today. I truly appreciate the opportunity to share with you some thoughts about North America and the relationship between Canada and Mexico.

I am particularly grateful to Jessica Perkins, Publications and Communications Director of the Independent Study Committee on Mexico, for her kind invitation to participate in this symposium. Also, I would like to express my sincere recognition to Mr. Carlos Pujalte, Consul General of Mexico in Toronto, for his ongoing efforts in promoting these kinds of dialogues.

Now, I would like to talk to you about some of the main results and challenges that we see NAFTA facing today and the achievements that we have been able to attain in the Canada-Mexico bilateral relationship.

In the ten years of NAFTA, trade has essentially more than doubled in volume; financial flows over the last decade among the three countries have reached \$1 trillion USD; and more importantly, 96% of all of our trade and investment relations flow smoothly. NAFTA has been fundamental to the creation of a prosperous Mexico. In a sense, the relationship among our countries has been transformed since its implementation. We have learned that if we work together and agree on our objectives for the region we can build a stronger relationship that will allow us to face the emerging challenges in the future.

The NAFTA region is today the world's most dynamic with regard to trade exchanges. This agreement has served to increase trade volumes and subject them to rules that provide guarantees of legal certainty, even though we recognise we still have some problems. Today, more than ever, cooperation and exchange are the cornerstones of progress. Fair trade, governed by rules, is the basis for the growth of economies. Mexico regrets any unilateral decision that fails to abide by the decisions of the arbitration panels where trade differences are discussed and aired.

Mexico believes that, through the correct implementation of the agreement, our countries will create better trade opportunities for our businessmen. Further, Mexico believes that when international commitments are promptly honoured, we diminish uncertainty in the region and can maximise the benefits of the NAFTA. Institutions and procedures must be strengthened, not weakened.

Nowadays, there is a growing scepticism about trade and liberalisation. I believe that our governments have the will to move forward in the process of making the North American region an economically strong one and therefore, we will have to improve our communication channels at all levels in order to take advantage of all of the benefits that NAFTA can bring to all of us. Together we should protect our jobs, improve quality of life for our people, and accelerate our capacity to expand our trade with other economic blocs. North America has greater potential for growth and creation of opportunities. We must move forward in keeping with reality and the challenges posed by a more competitive and complex international setting.

The future of North America must guarantee greater competitiveness, greater regional security, greater trade exchanges, and, naturally, greater well-being for all of its inhabitants. This is why we must join our capacities and develop our competitive advantages!

Today, these discussions are taking place in the context where security — the security of nations — has certainly become one of our main shared concerns. We must think carefully about this issue.

Mexico is undergoing a catharsis in its foreign policy and some of the major changes reflect its interior political transformation. There is also a catharsis in Mexico's relationship with North America. Nonetheless, this is an ongoing process, we will always be thinking about how to improve and take advantage of our geographical proximity.

In the Mexican Ministry of Foreign Affairs we submit that there are three essential objectives in order to fully exploit NAFTA:

The first objective is to enhance the job-creating capacity of our free trade agreement. One of the main discussions about accepting what NAFTA does, whether there is a net increment in the number of jobs or not, is a complex international debate. There is no doubt that trade has helped transform our economies and project them into the 21<sup>st</sup> century. I would like to suggest that, on the economic front essentially, any further development in North America should be enhancing the job-creating capacity of this trade agreement.

The second objective is to strike an appropriate balance between security and the facilitation of trade, the legitimate and secure flow of goods and people. Mexico, Canada, and the United States cannot afford otherwise. Mexico has more than \$720 million USD



worth of trade with the United States per day. Literally thousands of containers and almost a million people commute on a daily basis. This is an important factor for employment in the United States and Mexico. If we are going to think seriously about the challenges we face, especially from Asia and the European region, we must be sure to minimize any problems and to facilitate the legitimate flow of people and trade across our borders. And yes, we do need to have modern and secure borders.

I would argue that we have pre-NAFTA infrastructures along our borders. The increase of trade has been exponential, and yet the investment of resources in the technology and infrastructure of our borders has not grown at that pace. So we need to think seriously about those issues. I emphasise that we should find the appropriate balance between security and the facilitation of trade and movement of people. National security is not about eliminating 100% of the risk. That is not possible. It is about pricing risk, calculating risk, and taking policy decisions upon these calculations. That is the important challenge we have in terms of security.

Security cooperation over the last few years has probably become one of the most dynamic areas of cooperation in the bilateral relationship between Mexico and the United States, as is the case between Canada and the United States. Each day we are thinking more seriously about what aspects we can try to modernize in terms of security.

The third objective of this process has to do with establishing mechanisms that will provide legal, orderly, secure migration between our countries; one that respects the human rights of the migrant people and their basic needs. We need to establish mechanisms regardless of how much migration we have.

I truly believe that there are issues that should be tackled in the immediate future. First, our governments must strengthen their efforts to listen to the private sector and academia, to hear societies and to try to facilitate this process. There is a risk that our governments lag behind in this process. Second, what kind of process can we foresee? I would argue that we will not see a big-bang as we did in the nineties with NAFTA, but more of an incremental process with different steps and different phases. Third, our governments will have to find a way to get societies involved in a more active and intelligent way than we did previously; if not it is unlikely that we can move forward. The region's strength depends on the progress of three partners linked geographically through trade and friendship.



## CANADA-MEXICO BILATERAL RELATIONSHIP

In this debate the three bilateral relationships among our countries play a key role; certainly being of great importance is the bilateral relationship between Canada and Mexico — a relationship that has been strengthened in the last couple of years from simple trade partners to strategic allies.

Of course, we both try to privilege the relationship with our common neighbour, but I truly believe that we have finally realised and understood that if we work together we can achieve much more.

If we needed to use some adjectives to describe Mexico's bilateral relationship with Canada, I would choose two: dynamic and flexible. There is a high level of dialogue and agreement in many fields; in periodic encounters between officials and businessmen of both countries, and in the vast spectrum of cooperation in areas such as competitiveness, energy, health, federalism, e-government, migration, and security.

We have institutionalised our relationship to address every issue that might arise allowing us to advance in parallel on our increasingly broad bilateral cooperation agenda, which gives us the ability to attend to "sensitive topics" through dialogue and agreement.

Since we entered our democratic process in Mexico there is greater coincidence and even a common vision with Canada in areas such as democracy, human rights, and free trade, which has allowed us to work together in multilateral forums.

In this relationship the knowledge of our societies is of prime importance to the development of closer ties. The diversity of our rich cultures should be a source of enrichment that nourishes our societies. Tourism contributes to this aim and is a source of business, wealth, and jobs. At present, Mexico is one of the main tourist destinations for Canadians. Education and exchange programs are also vital to help us better understand each other.

For more than thirty years the Mexico-Canada Seasonal Agricultural Workers Program (SAWP) has been a successful example of legal, safe, and orderly migration between our countries, which has turned out to be of great benefit for our economies and our societies. This program has been contributing simultaneously to the enrichment of Mexico and Canada, and certainly has been an example to our common neighbours as to how temporary worker programs really do work. Thus, we should creatively look for the expansion of these types of programs. We should match supply with demand, and enhance our competitiveness and productivity.

In October 2004, the creation of the “Mexico-Canada Partnership” was agreed on as a strategic cooperation mechanism between the public and private sectors of our societies. Our strategic alliance enables us to position both countries in an increasingly demanding and competitive international environment. It also complements mechanisms such as NAFTA and the Security and Prosperity Partnership (SPP). It seeks to strengthen trade, improve our security, and raise our competitiveness. With this new partnership, both of our countries are pooling efforts to boost competitiveness, development of human capital, and sustainable development. It will also enable us to increase employment and improve labour standards, as well as to advance democracy, the rule of law, and human rights. We must strengthen cooperation and set priorities in bilateral trade and investment. We must reinforce business links and public-private partnerships.

Collaboration as partners will also bring benefits in the education sector, good government practices, and institutional reforms. It will contribute significantly to raising the well-being of our peoples. With actions such as these, we are enriching dialogue, cooperation, and the achievements of our partnership. The efforts and dedication in connection with our alliance will continue to increase cooperation between Mexico and Canada.

### **SECURITY AND PROSPERITY PARTNERSHIP FOR NORTH AMERICA**

Last March, NAFTA’s three trading partners signed the SPP for North America. The SPP provides a framework that builds upon our long-standing trade and economic relationships, complementing existing bilateral and trilateral efforts, and bringing momentum to other aspects of our relations in areas such as the protection of our environment, food supply, and public health.

Through the SPP our three countries intend to benefit in three areas: (1) Better economic opportunities for our citizens – enhancing the competitive position of North American industries in the global marketplace. There are plenty of issues that are being discussed such as: standards and regulations to facilitate trade and reduce transaction costs, moving into common markets (on some specific economic sectors), and reviewing a common policy on e-trade and e-commerce, among others. (2) Improved quality of life by addressing disparities, promoting the full potential of our people, maintaining high standards of health and safety, and protecting the environment. (3) A safer and more secure North America by establishing a common strategy to streamline

the movement of legitimate travellers and cargo across our shared borders.

We know that we still have a long way to go and many things to do but I am certain that the process that the SPP is initiating will help us achieve the goal of having a more secure and competitive North America. Now we are much more than an economic bloc, we are a dynamic region with hard-working people and democratic governments, with extended capacities and competitive advantages.

## **MEXICO**

With a vision of shared responsibility we understand that in order to have a more competitive region Mexico has to do its part in closing the gaps between and amongst our societies. Over the past five years, under President Fox's administration, Mexico has worked to lay the foundations of a better future for Mexicans to transition towards a more democratic society with justice and opportunities for all.

Citizen participation in government activities is now a basic rule in order to guarantee good government, compliance with the law, and transparency, accountability, and efficiency of public institutions. Today we have genuine competition among the various political parties, which reinforces transparency and reduces corruption. Thanks to the establishment of new accountability processes and the pre-eminence of the rule of law, today entrepreneurs, investors, and citizens in general enjoy unprecedented legal security in Mexico.

We have been able to achieve economic stability through fiscal and budgetary discipline. The exchange market has remained stable, international reserves have grown to all-time highs, and we have significantly reduced foreign debt, thus making the country less vulnerable to external financial shocks.

The strength of our economy and democracy are producing broad opportunities for investment in Mexico. Mexico is clear about doing what is needed to have a stronger North American region, thus bringing a better quality of life.

## **CONCLUSION**

I believe that diplomacy finds in the 21<sup>st</sup> century its very essence in the need for nations to construct common visions about the challenges and opportunities that very rapidly change in the world. Certainly migration, trade, and security are the major challenges and opportunities facing the North American region, and we have created the right channels to adapt

transportation and trade in goods and services to this new and challenging situation.

I truly believe that debates are helpful for understanding and constructing common visions. We will need perseverance because this is going to be a long process. We will also need a lot of creativity from the three societies, but mostly, we will need a lot of political compromise in order to push this process forward.

I cannot tell you enough how much I appreciate being here this morning, personally and institutionally. On behalf of the Mexican Government, I thank the Independent Study Committee for inviting me to speak here today.





# The Future of Canada-Mexico Relations

## Thinking Outside the Federal Box

Duncan Wood

The past four years have been a testing and difficult period for the North American partnership. The stresses and tensions brought on by the U.S.' new security concerns and the war on terrorism have made it near impossible for a common agenda to emerge that is of mutual benefit to all three partners. The huge differences that have emerged in the worldviews of the NAFTA countries and the priorities they pursue have meant that significant progress on North American integration has been unattainable. This is not to say that no new agreements have been negotiated; on the contrary there have been advances, most notably in the area of borders and business integration. But it would be fair to say that the prospect of a new era of integration that satisfies all three countries is as distant today as it has ever been.

The three governments face an array of challenges before they can realistically talk of a "NAFTA plus." First, they must await a "normalisation" in U.S. relations with the world in general and with its allies in particular, and a subsequent change in the U.S. foreign policy agenda. Second, public opinion in both Canada and Mexico must come to terms with a changed U.S. and be ready to get closer. Third, significant economic disparities among the three countries and among regions within the three countries must be addressed. Finally, and most importantly, a perception of mutual gain must emerge that would create the powerful lobby groups within the three states necessary to drive the process forward. This author believes such an alignment of the "integration stars" to be highly improbable in the near future.

However, at the same time as trilateralism in North America has been facing these challenges, the bilateral relationship between Canada and Mexico has been going from strength to strength. The signing of a Canada-Mexico partnership in 2005, the increasingly close cooperation between the two countries in the United Nations, and the Canadian

“courting” of Mexico in its 2005 International Policy Statement (IPS) are signs of the closeness discernible in bilateral affairs. The warmth and enthusiasm of the reception given to President Fox in Alberta in September 2005 was indicative of this, and stood in marked contrast to the disillusionment and disappointment felt towards him in his own country.

Yet this new found intimate relationship is not to be taken for granted. A range of challenges must be overcome in the near future if the progress of the past couple of years is not to be lost. Elections in both countries in 2006, combined with the problems of structural reform in Mexico’s economy, and the ever-present domination of the region by the U.S., require that the advances made by the two countries be institutionalised and a new framework for deeper and more long-lasting cooperation created.

This paper argues that the way to do this is to bring together stakeholders in areas of mutual interest for the two countries. In a large number of diverse issues the two countries have mutual interests, though these are not necessarily obvious at the federal level. Instead, sub-federal cooperation must be encouraged by empowering and encouraging actors at the provincial/state, municipal, and community levels from both countries to come together to design collaborative projects for the long term. Subsidiarity is therefore a key concept for this paper, as is the idea of the existence of specialised communities whose interests and worldviews would be served by closer cooperation.

## **THE PROBLEMS FACING NORTH AMERICAN INTEGRATION**

After eleven years it would be accurate to say that NAFTA has been a partial success. For although trade levels among the three countries have increased dramatically, and FDI has become a driving force for integration, a number of challenges still remain. First, integration is far from complete. While the Canada-U.S. and U.S.-Mexico economic axes of the region are flourishing, the Canada-Mexico economic relationship remains relatively underdeveloped. At the same time as this national breach exists, regional differences are of crucial importance in evaluating the agreement. Whereas some regions of North America have become highly integrated (Ontario, California, and Nuevo Leon for example), others (such as Labrador, Arkansas, and Chiapas) remain isolated by weak infrastructure, education, or communications from the opportunities offered by NAFTA. Perhaps most significant from the point of view of the legitimacy of the integration process is that large sectors of society in all three countries have yet to benefit from NAFTA.

The owners of the factors in demand in the region (capital, skilled labour, technology, management, etc.) have all had the opportunity to benefit from higher levels of economic cooperation. However, the disadvantaged, uneducated, unskilled, poor, and marginalised have been excluded from the “NAFTA bonanza.”

At the same time, we must note that the visions of the three countries with regards to North American integration are still highly divergent. Canada’s main priority in the NAFTA has always been to protect and expand its privileged economic relationship with the U.S. The U.S., on the other hand, since 9/11, has come to see the NAFTA through the lens of security, emphasising borders, intelligence cooperation, and controlling flows of people. Mexico’s priorities remain advancing the migration agenda with the U.S. while at the same time protecting Mexico from too much interference by its northern neighbour.

The Security and Prosperity Partnership (SPP) of North America, negotiated in March of 2005, highlighted these divergent interests, and the relative importance of the three NAFTA partners (Council for Foreign Relations, 2005). For the SPP reflected the interests and vision of the U.S. and, to a lesser extent, Canada while neglecting the North American agenda of President Fox. Weakened at home through disillusionment with his *Gobierno del Cambio* (government of change) and his inability to deal with a hostile and uncooperative Congress, Fox was unable to secure any significant mention of migration in the March meeting. The SPP’s focus on borders and facilitating the business climate represented the agenda of powerful interests in the U.S., interests with which Canada was able to come to an understanding. Thus, despite the signing of a three-party agreement, Fox’s sorry figure at the Waco meeting suggested a further weakening of trilateralism in the region.

Another major obstacle to significant trilateral progress lies in the disparities in levels of economic development and competitiveness among the three countries. Whereas the U.S. and Canada are highly developed, competitive economies with a healthy mix of agricultural, raw materials, industrial and services production, Mexico faces enormous challenges in terms of structural economic reforms. Thus far unable to make the full transition from a *maquiladora*, resource and cheap labour based economy, Mexico’s international competitiveness is under threat not only from China, but from other developing regional economies such as Brazil and Chile. The failure to move Mexico’s economy forward to a new stage of development and competitiveness has made it a much less attractive and important focus for international investors. Although Mexico still receives significant foreign direct

investment (FDI), there is a feeling in Mexico and internationally that the country is losing ground against other potential destinations. The interest, therefore, in the business communities in the U.S. and Canada to promote deeper integration with Mexico is somewhat limited by the perception that other countries may in fact offer a bigger bang for their buck.

## **A BILATERAL ALTERNATIVE: CANADA-MEXICO**

While it would be foolish to try to analyse Canada-Mexico relations without reference to the U.S., this paper suggests that there is ample room for a bilateral agenda for cooperation to emerge between the extreme north and south of NAFTA independently of the giant that divides them. Canada and Mexico have made tremendous progress in recent years, in part because of the problematical nature of relations with the U.S.

The immediate period following 9/11 was incredibly difficult for Canada-Mexico relations, with Canada preferring to negotiate bilaterally with the U.S. over new border arrangements rather than risk “Mexicanizing” the U.S.-Canada border (Hristoulas, 2003). Other tensions arose between Mexico and Canada in early post-9/11 discussions over the future of NAFTA with the Fox government pushing for a “NAFTA plus” involving a migration accord, a social fund, and heavy investment in infrastructure, a.k.a. the “whole enchilada.” The standard Canadian response to appeals from the Fox government for support was simply “what’s in it for us?” At the time, the Canadian government as well as the business community seemed to define North America in strictly Canada-U.S. terms, including Mexico only “when possible.”<sup>1</sup>

These tensions, however, began to dissipate as problems grew between the two countries on the one hand, and the U.S. on the other. The U.S. war on terror, and in particular the invasion of Iraq, pushed Canada and Mexico towards a rapprochement. As their foreign policy agendas began to coincide, especially in the United Nations, a greater mutual understanding also began to emerge.

The creation of the Canada-Mexico Partnership (CMP) in October 2004 marked a significant step forward in bilateral affairs and was intended to develop the strategic relationship between the two countries. It brought together leading figures from business and government in both countries to discuss bilateral cooperation in a broad

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1 Dobson 2002.



range of areas. Initially, three working groups were created in the areas of urban development and housing (looking at both sustainable cities and housing), human capital, and competitiveness.<sup>2</sup>

Shortly afterwards, the Canadian government issued its 2005 IPS, which pleased its Mexican counterpart enormously. First, the statement emphasised the importance of North America as a priority for Canada, with the region defined in trilateral terms. Unlike in earlier formulations of North America, Ottawa had apparently now come to see Mexico as a full partner in the region. Second, the IPS was replete with references to Mexico as an important country for Canada, not only in the region but also internationally as a partner in international institutions.

In September of 2005 in another bilateral meeting between President Fox and Prime Minister Paul Martin, the two mandatories celebrated the high level of cooperation between the two countries, giving particular emphasis to the temporary workers agreement that has seen around 13,000 Mexican agricultural workers come north to Canada for seasonal employment. Although only a small program, discussions have begun to consider expanding the program to include workers from other sectors.

Given this impressive progressive in the past couple of years, it would be tempting for advocates of the bilateral relationship to sit back and rest on their laurels. However, it is clear that the current state of affairs is an unstable one, vulnerable to changes in the national governments of the two countries concerned, and to changes in the U.S. It must be remembered that 2006 brings federal elections in both countries. A conservative victory in Canada could easily mean a swing back towards the U.S. to the detriment of Mexico, and a left-wing PRD victory in Mexico could mean a declining interest in North America in general. Unlike the U.S.-Canada and U.S.-Mexico axes of North America, the Canada-Mexico economic relationship lacks the same intense interdependence and is far from expendable in considerations of the national interest. Whereas the first priority of Canadian foreign policy may be “keep the U.S. border open” to maintain the flow of goods south, it is difficult to imagine Canadians attaching the same importance to the flow of tourists to Cancun or Acapulco! Mexico is therefore not yet an “assumption” in Canadian politics in the same way that the U.S. is for both Canadians and Mexicans.

Nor have Mexico and Canada reached a level of cultural and societal understanding that facilitates stable long-term cooperation. Whereas Canada and the U.S. have reached an at times uneasy cultural

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2 PMO 2005.

accommodation over the last two centuries, and the U.S. and Mexico are experiencing a new level of cultural and social integration through the presence of tens of millions of Mexican and Latino migrants in the U.S., Canada and Mexico remain distant neighbours. One idea that has been floated to bridge this cultural divide is to encourage more Mexican migration to Canada. This rather seems like putting the cart before the horse, however. Surely we need to decide if and why Mexicans are needed in Canada for economic purposes rather than just importing Mexican populations to encourage greater understanding!

### **PLOTTING A SUB-FEDERAL FUTURE FOR BILATERAL RELATIONS**

Given these uncertainties and the current healthy nature of the relationship, the time is right, therefore, to take steps to institutionalise the progress of the past couple of years and to lay the foundations for continued cooperation in the future. This paper argues that the best way to do this is not through the traditional means of federal government – federal government cooperation, but rather through sub-federal and societal networks that are not subject to the same shifts in political winds that can jeopardise close cooperation.

Who will lead the process forward in such a way? Interestingly enough, from the Canadian perspective the key political actor will probably not be the federal government. Instead this paper argues that the process should be driven from the bottom up. In particular, provincial governments will explore the opportunities in the region to see what they can best take advantage of in a wide range of areas, from business, to culture, to education, to sports. The growing interaction between provincial premiers and the governors of states in Mexico is testament to the will of this level of government to engage in non-traditional forms of diplomacy. Municipalities may also play a growing role, although that is not so well advanced as of the time of writing.

This is not, of course, a novel approach to international cooperation. There is a long tradition in international relations of looking for sub-national drivers of bilateral and multilateral cooperation. In the 1950s and 1960s the neo-functional approach suggested that interested communities within society would push governments towards the creation of supranational arrangements. Putnam's two level games approach put forward the idea not only that domestic politics mattered in international cooperation and vice-versa, but more appropriately for the present study that transnational alliances of domestic level actors could be formed to secure international agreements.

What's more, the idea of sub-national governments in moving forward with piecemeal cooperation suggests a notion reminiscent of the European model of integration. Subsidiarity, the idea that policy and government functions should be transferred to the lowest level of government capable of effectively carrying them out, has yet to be explored in North America but holds enormous potential for opening up relations between different areas within the region. The economic concept of growth nodes and the potential for synergy between the factors of raw materials, labour, and technology, are so abundant throughout the region but widely dispersed, areas that provincial and state levels of government are likely best able to explore. Complementarity in education, health care, and even employment needs are other areas that would benefit from a less macro, more area specific approach. Although I would not suggest that subsidiarity in North America acquire the *de jure* status it holds in the European Union, a *de facto* approach to the concept holds great potential.

But public authorities at the sub-federal level are not the only actors considered here. In addition, key communities holding specialised knowledge and sharing similar worldviews present a useful counterpart in, and support to, the integration process. The epistemic community approach, focused on the issues of learning in international politics and knowledge-based networks of professionals achieved a respectable following in the early 1990s and may hold some wisdom for the future of bilateral relations. It is possible to identify groups in the two countries that approximate the established definition of an epistemic community, that is, a network of individuals with:

- A shared set of normative and principled beliefs;
- Shared causal beliefs;
- Shared notions of validity; and,
- A common policy enterprise.<sup>3</sup>

For many years North American integration has depended on the three national business communities for its impetus. Future cooperative efforts between Canada and Mexico, however, will benefit enormously from the participation and leadership of interested groups, or stakeholders. I argue that in the areas outlined below there exist both communities, and an interest on the part of their members in both countries to move forward with bilateral cooperation.



*Education*

The CMP has already identified human capital as a key component in the drive for international competitiveness and as an area in which Canada and Mexico can work together. The collaboration of the Association of Universities and Colleges of Canada (AUCC) and Asociación Nacional de Instituciones de Enseñanza en Relaciones Internacionales (ANIERI), along with government agencies, has shown that space exists for the operation of a transnational epistemic community. Yet the steps taken thus far are but a small portion of what could be achieved, given the right circumstances.

Given the provincial domain over education, it would make sense for Canadian provinces to join these parties and directly engage the Mexican authorities to identify key areas of collaboration. Reducing the differences in the levels of public education from pre-primary through to university would clearly be in the interest of Mexico, but labour markets in Canada (and North America in general) would benefit from improved standards and the possibility of harmonised vocational standards.

A harmonisation of educational standards may seem like an awfully ambitious goal given the enormous disparities between the two countries. But initial steps could be taken that focus on the university level. Canadian expertise in a state-run university system can be matched with the experience of Mexican experiments in private tertiary education, an experiment that has had mixed results to date, with certain examples of excellence. The highly entrepreneurial nature of Mexican university education, however, offers much to its Canadian counterpart, as do its links to Latin America and the challenging experience of working in a developing country.

*Health and Social Security*

Although Canadians are by now used to the idea of an imminent crisis in their systems of public healthcare and social security, they recognise that they are amongst the best-protected citizens in the world in this regard. Mexicans, on the other hand, have come to accept that the state cannot provide the necessary protection at a satisfactory level, and have embraced a mixed system. Although the public healthcare system in Mexico cannot satisfy the needs of its clients, and desperately needs new investment, there is no shortage of well-trained professionals. These professionals need money and the opportunity to practice.

One simple and seemingly straightforward mode of cooperation would involve the creation of training programs in Canada to bring



Mexican healthcare providers (both doctors and nurses) with the necessary knowledge to allow them to practice in the Canadian context. Northern populations in Canada already suffer from a lack of healthcare providers; if we can bring in seasonally workers for agriculture, why not consider expanding the program to the area of health sciences? Given the fact that health comes under their mandate, the provinces would be key actors in this regard, but also universities, doctors, and professional associations in both countries. The exchange of medical know-how and expertise would presumably benefit both scientific communities as well as healthcare recipients.

A more radical idea would be a cooperative agreement to build healthcare facilities in Mexico (likely in the vicinity of large ex-pat communities there, such as Lake Chapala), where Canadians could go to receive medical attention. If snowbirds already receive medical attention in Florida, why not promote the idea of lower-cost alternatives in Mexico? Private insurance companies are already experimenting with the idea of encouraging American and British clients to seek healthcare in India, at a fraction of the cost. Senior citizen care could easily be included in such an agreement, with the creation of long-term care facilities.

Such healthcare could easily be covered by the state at a reduced cost than that already paid for similar services within Canada. Alternatively, a public-private collaboration between the public health service in Canada and private insurance companies could provide another option.

#### *Infrastructure and Transportation*

Mexico is in desperate need of heavy investment in its economic and transportation infrastructure. In 2006, a victory in the Mexican federal election by Andrés Manuel López Obrador (AMLO) will likely bring a renewed interest in infrastructure spending, both in terms of long-distance communications (such as highways and railways) and in urban infrastructure. Given his record as mayor of Mexico City, he is willing to spend impressively in this regard. It would surely be in the interest of Canadian companies such as Bombardier to encourage a healthy dialogue with the Mexican government at such a time; however, an earlier, pre-election approach by groups of experts in infrastructure planning from Canada would ease the way for such a business opportunity to arise.

Canadian provinces and municipalities would be important partners if a dialogue on urban infrastructure was to emerge, and the

discussions would fit in neatly with the sustainable cities program. The success of urban transportation systems in cities such as Toronto, Ottawa, and Montreal provide examples that Mexican cities may wish to imitate, or at least from which they may learn valuable lessons. Investment in long distance transportation systems has been a crucial element of the Canadian national story, from railways to the trans-Canada highway. The engineering, planning, and financing expertise contained in government, as well as in private firms, would be of enormous benefit to Mexican planners.

### *Energy*

Mexico is currently facing an imminent energy crisis. High prices for electricity and gas are compromising the competitiveness of Mexican business, consumers are facing blackouts and an uncertain future in energy supply and, most shockingly for the Mexican psyche, at current levels of exploitation and investment in exploration, Mexico will become a net oil importer at some time between 2008 and 2016. What's more, there is a lack of well-trained engineers and geologists in the country (particularly in the area of oil exploration), which further compromises the possibility of a homegrown solution to the problem. Unfortunately the debate over energy reform in Mexico remains dominated by oil and mired in outdated conceptions of sovereignty and protecting the national treasure.

Already a number of Canadian firms are working with the Mexican government to deal with some of the myriad problems facing the electricity and natural gas sectors. This cooperation is by necessity limited due to the strict public control over electricity generation. In the oil sector, PEMEX's experimentation with multiple service contracts (MSCs) has allowed limited collaboration with Canadian firms, but a full-scale opening-up of the Mexican energy sector is a long-way off.

Canadian provinces (in particular Alberta, Ontario, and Quebec) would be important partners in any discussion on energy reforms in Mexico. Alberta's hugely successful natural gas exploitation holds important lessons for Mexico, and Ontario and Quebec's experience with hydroelectric generation could help certain areas of Mexico to come up with alternative energy sources. While Canada does not hold any significant expertise in offshore deepwater oil drilling (where significant new oil reserves may be found in the Gulf of Mexico), the key benefit from the creation of an energy dialogue between the two countries would be the transfer of knowledge and expertise to help Mexico fully exploit its energy potential. In this sense provinces,

universities (to offer training facilities), and industry associations would be important collaborators.

#### *Indigenous Affairs*

While Canada has had a far from perfect record in its dealings with its indigenous populations (or First Nations), it would be fair to say that the current standard of living of the majority of Canadian First Nations citizens is far above that of their Mexican counterparts. Of course the histories of the two countries in their dealings with indigenous populations could hardly be more different: in Canada, a history of land treaties, separation, confrontation, and eventual cohabitation with the prospect of political and economic development; in Mexico, the culture of *mestizaje*, marginalisation, and ultimately rebellion in 1994.

Significant sections of Canada's First Nations today have achieved greater political and economic autonomy and have begun to look outside of Canada for contact with other indigenous peoples. Recent years have seen a flurry of activity in this regard, with high-ranking indigenous individuals visiting Mexico. Cultural exchanges, discussions over economic cooperation, and importantly, the visit of Paul Okalik, premier of Nunavut, in November of 2004, have heralded this new era of "indigenous diplomacy."

Indigenous affairs will be of great importance to the next President of Mexico as levels of protest among the *pueblos indígenas* of southern Mexico are again rising. With the chaotic southern border already facing the challenge of rising levels of violence and disorder due to the *maras* (or gangs originating in central America), a constructive dialogue that leads to significant improvements in the standard of living of the indigenous population is desperately needed. It is here that the Canadian federal and provincial governments, but more importantly First Nations, may be able to play an "honest broker" role. The indigenous communities in both Canada and Mexico hold many of the qualities normally attributed to epistemic communities, particularly in the areas of shared normative and principled beliefs, shared causal beliefs, and shared notions of validity.

What do Canadian indigenous groups stand to gain from this cooperation? A sense of prestige, international recognition, and perhaps most importantly, a heightened sense of community and brotherhood in the hemisphere would be key achievements. The Mexican government stands to benefit as a process of dialogue replaces confrontation, as well as the potential for economic transfers from wealthier Canadian First Nations to marginalised populations in the southern states.

*Federal Government Cooperation*

This paper has focused its attention on sub-federal cooperation. However it would be foolish and shortsighted to ignore the numerous areas of interest and potential cooperation to both federal governments. Of course the two federal governments need to lay the foundations and prepare a framework within which such sub-federal cooperation could take place. But we must also consider the interest that exists in federal collaboration in areas such as foreign policy, in particular international institutions, fiscal reforms, and regional development (the abortive experience of the Puebla-Panama Plan (PPP) contains many valuable lessons for both governments). A final area that may hold potential is that of peacekeeping and peacebuilding. Although constitutional constraints limit the potential at the present time for military-military collaboration, the federal electoral institute (IFE) has already been active internationally in Afghanistan and Iraq in promoting free and fair elections. What's more, the space exists for the transfer of peacekeeping expertise from, for example, the Pearson Centre, to those agencies of the Mexican military (such as the navy) that are ready to listen.

**CONCLUSION**

This paper has argued that significant potential exists for future cooperation and collaboration between Canada and Mexico at the sub-federal level if an adequate framework can be created to promote a vibrant dialogue that includes relevant communities, both political and knowledge-based in both countries. Although such far-reaching collaboration may seem improbable at the time of writing, the example of the CMP holds the potential for broader and deeper cooperation that can be continued by political authorities in the future at multiple levels.



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# The Puebla-Panama Plan A Strategy for Regional Development?

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## ABSTRACT

The Puebla-Panama Plan (PPP) appeared in the first year of Vicente Fox's administration as a program of regional development for the southeastern states of Mexico and its links with Central America. It is based on two suppositions: that the region lags behind the rest of the country, especially in regard to infrastructure, poverty, and marginalisation; and that since Mexico has seen great inequality in the implementation of public policies it is necessary to "insert" the region into the stream of globalisation.

World Bank estimates indicate that Mexico will need an investment of \$20 billion USD per year for the coming ten years in order to close the gap in that line. But the nature, amount, scope, and political impact of those investments have been rejected by many indigenous communities, social organisations, and political forces, locally as well as nationally.

The official basic diagnostic of the region's troubles remains the same as many years ago: the region's agricultural zones are poorly structured, its industrial space is concentrated in only one area, communications are deficient, and its predominantly youthful demographic pattern contrasts with the distribution of its population. But the general formula for solving the problems remains quite conflictive (to open up, privatise, and deregulate) and the priorities and amount of public expenditure benefit the few.

This paper will identify, critically, the most important economic, political, and social challenges related to the PPP, and will answer to

what extent the region is not only already inserted into the stream of globalisation through regionalisation with North America, but has also suffered its worst effects, looking at the content and direction of exports and imports, the nature of agricultural activities (coffee, corn, beans, sugar, rice), and the ecological damage to biodiversity due to the exploitation of natural resources, oil, petrochemicals, electricity, as well as activities such as tourism.

Finally, it will criticise the linear relationship established in the PPP between communications and development, arguing that the connection remains unclear, and concluding that without explicit public policies, built by consensus with the local communities in all of the aforementioned areas, it is impossible to speak of a "strategy of regional development."

## INTRODUCTION

This paper has been organised into four main sections. The first one gives some historical background to understand the specificity of regional development in the Mexican experience, going back from the model of Import Substitution Industrialisation (ISI) to the most recent Export Oriented Industrialisation Model (EOI). It recovers recent data from regional changes to show increased polarisation instead of regional convergence and the worst welfare indicators concentrated in the southern region.

The second section recovers the basics of the PPP as a regional development plan for the southeast region, calling attention to the different stages that the project has gone through, until finally "greening" its projects and widening the institutional scope as to leave it practically in the hands of the Inter-American Development Bank (IDB). It is also related to other transnational projects now at work directly or indirectly in the big region of Central America and Mexico, such as the Free Trade Area of the Americas (FTAA), the Central America Free Trade Agreement (CAFTA), the Mesoamerican Biological Corridor (MBC), and with the deepening of the North American Free Trade Agreement (NAFTA).

In the third section, we take a look at the geo-economic potential of the South-Southeast (S-SE) region of Mexico, its natural resources, pool of cheap labour, biodiversity, and strategic geographical situation for international trade, but also to the problems of poverty and vulnerability to natural disasters.

In the final section, we examine the federal expenditure priorities in order to show the real level of resources committed to the project and the consistency of the same. This is to say that only the



development of highways and electricity interconnections are revealed as real priorities. Furthermore, going through the lack of coordination in agriculture to the environmental crisis of the region, inconsistencies are shown. We conclude with some ideas for the construction of ecological alternatives, building a new consensus with the indigenous communities and people of the region.

## **HISTORICAL BACKGROUND**

Until the 1980s, regional development policies in Mexico were in reality sectoral development policies, with projects carried out in the U.S. as their model (such as the Tennessee Valley Authority program in the 1930s). For example: the development of hydraulic works to expand the frontiers of agriculture in the north; the promotion of industrial parks and cities in the central regions to stimulate the emergence of new industries; the encouragement of economic development in the arid and semi-arid zones which constitute the largest portion of Mexican territory; and the development of programs for taking advantage of water catchments (such as those on the Balsas, Papaloapan, or Grijalva rivers in the states of Guerrero, Veracruz, and Chiapas respectively).

Between the decades of the 1940s and the 1970s, under the ISI model, the state functioned as the engine, protagonist, coordinator, and executive of public policies devised in order to create a commercial class which would generate employment for salaried workers.<sup>1</sup> Under this industrialisation scheme, the design of sectoral policies always had regional implications, though this geographical dimension tended to depend on the weight that regional power groups had within the federal government. One notable feature of Mexico is its strong regional disparities. This, among other reasons, has led some to speak of a northern Mexico and a southern Mexico since the mid-1990s.

In the fifteen years since 1990, the strict logic of North American integration and the emergence of information technologies has held sway, and it is evidently since this date that the notion of 'locking-in' the structural reforms imposed in the 1980s, which were oriented towards implanting the new EOI model, has come into force.<sup>2</sup>

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1 See Francisco García Moctezuma, *El ordenamiento territorial y la planeación del Desarrollo en México, la Macro-región mexicana del Plan Puebla Panamá*, Ph.D. Thesis, Faculty of Economics, UNAM, Mexico, 2005, chapter 2.

2 I have examined the global logic of this process in Alejandro Álvarez, "México: relocating the State within a new global regime", in Stephen Clarkson and Marjorie Griffin Cohen, eds., *States Under Siege: semiperipheral countries under Globalism* (London, U.K.: Zed Books, 2004).

For this same reason, since the end of the 1980s regional policy was in good measure linked to the needs of social policy, which explains why programs for alleviating poverty were concentrated in the S-SE region, such as the National Solidarity Plan initiated by Carlos Salinas de Gortari, which played a key role in the Mixteca zones in the state of Oaxaca, the Selva Lacandona in Chiapas, and the Huasteca zone of Veracruz. At the end of the 1990s, the so-called "Priority Region Attention Program" emerged with President Ernesto Zedillo, which covered the Cañada norte, Selva Norte, the Sierra, and the coastal areas of Chiapas; the Mayan areas of Campeche and Quintana Roo; the eastern and coastal areas of Yucatán; the Sierra, Montaña and Costa Chica areas of Guerrero; the Isthmus-Papaloapan, Sierra de Juárez and Mixteca zones of Oaxaca; the Sierra Norte and Mixteca areas of Puebla; and in Veracruz the Sierra de Sotapan, the Valle de Uxpanapa, and the Sierra Negra de Zongolica.<sup>3</sup>

Since then, there have been very significant changes to the five major regions of Mexico (being the North, the Pacific, the Centre-North, the Centre and the South-Southeast), beginning with the increasing transnationalisation of economic interests which now operate with near-complete freedom in the country. These are significant changes as much for their effect on the behaviour of the Gross Domestic Product (generated by state and by per capita GDP) as for that on the standard of living of broad swathes of the population affected by the logic of structural changes, something which can be seen clearly reflected in indicators of well-being and of human development, as well as poverty indexes.

One of my colleagues at the faculty has demonstrated the existence of important changes using the most recent and detailed statistics, from both the Mexican National Census System run by the INEGI (National Institute for Statistics, Geography, and Information) and the Human Development Index (HDI) by state of the UN's "UNDP Report on Mexico" (the first set showing information at municipal or Basic Geostatistic Area levels, and the second taking into consideration over 30 socio-economic variables from income levels and employment, to living conditions (existence of piped water, electricity, and drainage), and health, to educational levels, among other indicators).<sup>4</sup>

3 See Pedro Ponce Javana, *El PPP y las comunidades indígenas*, Ph.D. Thesis, Universidad Autónoma de Chapingo, México, 2005, still without examination date.

4 See Gabriel Mendoza Pichardo, "Evolución económica y social de las regiones de México, 1990-2005", Paper to the *Seminario De las Integraciones Regionales a los Cambios Locales*, Faculty of Economics, UNAM, 2005; see also Germán Sánchez Daza y María Eugenia Martínez

These changes consist of various significant trends in regional development in Mexico from 1980 on: firstly, the increasing polarisation of the northern and southern states (all the northern states gained in relative share of the total GDP and of GDP per capita, while the states in the Pacific, Centre and S-SE regions lost out); secondly, between the 1980s and the year 2000 the tendency towards convergence of GDP and per capita GDP among the states that existed from 1950 to 1980 can be said to have decelerated; thirdly, that if we order the population according to strata of well-being, the northern states possess the best indicators both on the upper and the lower strata (indicating that a higher percentage of their population belong to the highest level of well-being indicators and a lower percentage is located on the lowest level), while the worst-off region is that of the S-SE, the states standing out for having the worst indicators being Chiapas, Guerrero, and Oaxaca. It has been said, quite rightly, that poverty is not just another variable but the key factor explaining almost everything that goes on in the S-SE. The other crucial factor is the existence of abundant energy resources.

### THE PPP AS REGIONAL DEVELOPMENT PLAN FOR THE MEXICAN SOUTH-SOUTHEAST

As is well known, the PPP appeared in the first year of Vicente Fox's administration as a key part of its National Development Plan, focused on the links between Mexico's S-SE region (which includes nine states: Puebla, Guerrero, Oaxaca, Veracruz, Tabasco, Chiapas, Campeche, Yucatán, and Quintana Roo) and seven Central American countries (Guatemala, Belize, Honduras, El Salvador, Nicaragua, Costa Rica, and Panama). It is based on two assumptions: that the region lags behind the rest of the country, especially with regard to infrastructure, poverty, and marginalisation; and that since Mexico has seen great inequality in the implementation of public policies it is necessary to "insert" the region into the stream of globalisation.<sup>5</sup>

The truth is that from its launch to the present the PPP has passed through a number of stages: firstly a propaganda-led launch (2000-2001), then a crisis due to popular resistance (2002-2003), then a decline and practical disappearance from public political life (2003-

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de Ita, "El patrón de reproducción global: la integración de los estados del Sureste mexicano", *El Cotidiano* 129 (2005), UAM-A, México, 75-83.

5 See Alejandro Alvarez, "The Puebla-Panama Plan: ¿Desarrollo Regional o de un Enclave Transnacional?", *Observatorio Social de América Latina*, CLACSO, Argentina, June 2001; see also Hepzibah Muñoz Martínez, "State, Capital and 'Second Nature': Re-territorialization in the Plan Puebla Panama," *Capitalism Nature Socialism*, 15.1 (March 2004), Routledge, 67-81.

2004), to finally move in silence (2005) by means of the projection of a new image, the promotion of sustainable development, and a new institutional apparatus, that of the IDB, promoting new local participation schemes and alliances with some indigenous communities.<sup>6</sup>

The PPP includes eight initiatives with projects focused on sustainable development, human development, natural disaster prevention, sustainable tourism, commercial streamlining, telecommunications, road networks, and electricity interconnection. Later on we will see that these last two, highway infrastructure and electricity link-up, are its real budgetary priorities. We can add right now that there is clear evidence that the PPP is a link in the chain to expand the reach of NAFTA while the hemisphere progresses towards the FTAAs.<sup>7</sup>

It is important to remember that the PPP is not the only plan of multinational scope at play in the region, since in 2005 the U.S. signed the CAFTA with the Central American countries, an agreement which covers the most important Central American states and which will have a profound impact on the production, commerce, and economy of these countries and of the S-SE states of Mexico. It will generate a significant expulsion of labour, above all from agricultural activities, from a part of the population which tends to look north to emigrate, which partly explains the current obsession of the Republicans with the frontier security agenda in the U.S. and their plan to stem this flow by raising a wall along the border with Mexico while establishing a partial agreement on temporary guest workers, while at the same time refusing an amnesty for those who are already working in the U.S. undocumented.<sup>8</sup>

Also in operation in the region for a number of years is the MBC,<sup>9</sup> financed by the World Bank, which is formally aimed at preserving the biodiversity of four states of the S-SE of Mexico (Chiapas,

6 This idea is clearly developed by Neil Harvey, in "El capitalismo ecológico y el PPP: la transformación de los recursos naturales de Mesoamérica," *Comercio Exterior* 54.4 (April 2004), México, 319-327; Laura Carlsen makes a detailed examination of the two basic models now at play in the PPP region, the Corporate conservationist Model and the Indigenous-peasant stewardship Model, in "Conservation or privatization? Biodiversity, the global market and the Mesoamerican Biological Corridor," chapter 4 in Gerardo Otero Ed., *Mexico in Transition (Neoliberal Globalism, the State and Civil Society)* (London-New York: Zed Books, 2004).

7 These arguments were widely developed in Alejandro Álvarez and Gabriel Mendoza Pichardo, "La Infraestructura prioritaria en el PPP y los indicadores de bienestar social en el sur-sureste de México," *Imaginales* 1 (Jan.-July 2005), UNISON, 11-38.

8 See Laura Carlsen, "From NAFTA to CAFTA to FTAAs", available at <<http://americas.irc-online.org/am/655>>; for the analysis on immigration bill H.R. 4437 in U.S. Congress see David Bacon, "The Border is a Common Ground Between Us", *Fiatlux Redux* (19 Dec. 2005), available at <<http://www.fiatlux.info/december2005/borderisacommonground.html>>.

9 See World Bank, *Proyecto del Corredor Biológico Mesoamericano-México*, 21136-ME (6 Dec. 2000), Washington, D.C.



Campeche, Quintana Roo, and Yucatán) and the seven Central American states, although in these same states there are numerous accusations that the project is really concerned with developing what in practice is better known as bio-piracy.<sup>10</sup>

The basic diagnosis of the region's troubles remains the one originally formulated by a group of economists lead by Santiago Levy, in a technically sophisticated study carried out at the request of the Ernesto Zedillo administration after the Zapatista rebellion in Chiapas.<sup>11</sup> According to that study, in the S-SE the agricultural space is poorly structured, its industrial space is concentrated in only one part (the state of Puebla, though recently assembly plants have been established in Puebla, Yucatán, and Chiapas), communications are deficient, and its predominantly youthful demographic pattern contrasts with the mostly rural distribution of its population (60% dispersed over a huge rural area, that is to say nearly 11.5 million people living in settlements of less than 2,500 people and 5.3 million in settlements of less than 15,000 people), with 11 million people concentrated in 156 urban areas below the size of the national average.<sup>12</sup>

### **BASIC FEATURES OF THE CURRENT STATE AND THE ECONOMIC POTENTIAL OF THE S-SE REGION**

The S-SE of Mexico covers 25% of the territory of the country (around half a million square kilometres) and around 18% of the population in the 2000 census, which generates 11.6% of the country's GDP. Of this population, over 4 million are indigenous peoples, (out of a total of 6 million in the country as a whole), so that in the region the languages most widely-spoken after Spanish are Nahuatl, Maya, Zapoteco, and Mixteco, though in each state a further eight to fifteen languages are in use, which together with geographical isolation explains the precariousness of basic education levels.<sup>13</sup> This also explains the reference to a region of huge cultural and linguistic diversity.

To top it all, the poverty indicators and the geographical situation have become a nightmare since the majority of the states in the region are located in a zone which due to its geographical conditions is

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10 Another detailed and critical review of that Project can be found in Gian Carlo Delgado, *Biodiversidad, Desarrollo sustentable y Militarización*, Plaza Janés-CIIH. UNAM, México, 2004, particularly chapter 2.

11 See Santiago Levy, "El Sur también existe: un ensayo sobre el desarrollo regional de México", *Agenda Estadística del INEGI* (Instituto Nacional de Estadística e Informática), México, 2000.

12 See Francisco García Moctezuma, chapter 1, 152.

13 See Pedro Ponce Javana, chapter 4.

highly vulnerable to natural disasters, given the incidence of hurricanes, earthquakes, and volcanic activity.

As we have pointed out, the region comprises nine states and is very rich in natural resources: it concentrates almost 80% of the oil reserves in Mexico (in Tabasco, Campeche, and Veracruz), while the petrochemical complexes in the state of Veracruz generate 90% of the oil products consumed in the country. The four Mexican states which border on Guatemala and Belize (Chiapas, Tabasco, Campeche, and Quintana Roo) possess the run-off of one third of the water in Mexico and the abundance of water has brought hydroelectric development as a consequence, such that four dams in the S-SE provide 40% of the country's hydroelectric energy. If we also take into account that 70% of the country's energy is provided by thermo-electric plants, the fuel for which is extracted from Chiapas, Tabasco, Campeche, and Veracruz, this adds up to a key region for Mexico's energy.

In the Mexican states of the S-SE and the Central American states as a whole, 10% of the planet's biodiversity is concentrated, so it should not be surprising that the World Bank launched the MBC project in the region. However, today agricultural activity is important to the population, from subsistence cultivation of corn, rice, and beans, to commercial cultivation of soya, African palm, coffee, bananas, mangos, and pineapples. Generally speaking, the worst threat comes from the menace of the introduction of genetically modified seeds (GMOs), a problem that can very rapidly accelerate destruction of life in many communities. A significant statistic released by the Federal Office for Agriculture in 2001 states that in the S-SE social property predominates (essentially cooperative property) in 70.8% of the total area, while private property covers 26.2%. Federal lands and agricultural colonies represent 3%.

In October 2003 the same Federal Office for Agriculture identified three groups of states with the greatest levels of poverty and the lowest standards of living: in Group 1, Chiapas, Guerrero, and Oaxaca with a total of 10.5 million inhabitants; in Group 2, Campeche, Tabasco, Veracruz, Hidalgo, Puebla, and San Luis Potosí with a total of 20 million inhabitants; and in Group 3 the states of Guanajuato, Michoacán, and Zacatecas with a population of 10.5 million. Altogether we are talking about over 40 million inhabitants in thirteen states, just four more than the number making up the S-SE region.<sup>14</sup>

Since it contains impressive natural beauties and pre-Hispanic and colonial archaeology and architecture, tourism is a key factor, consisting of several 'corridors' of huge importance for Mexico. These

14 See Pedro Ponce Javana, chapter 4.

are both on the Pacific (the so-called 'Sun Triangle' in Guerrero including Taxco, Acapulco, and Ixtapa-Zihuatanejo, and in Oaxaca, covering the state capital, Huatulco and Puerto Escondido) as well as on the well-known Gulf-Caribbean route in Yucatán (the Cancun-Tulum corridor and the routes of the 'Mayan World') while in Chiapas there is the Jungle-Sierra tourist corridor including Palenque, Agua Azul, Montebello, and San Cristóbal de las Casas.

Another feature of decided importance and worthy of attention is that the S-SE region has not only become an important region for the expulsion of labour towards the North — due above all to the agricultural crisis resulting from Mexico joining the NAFTA<sup>15</sup> — but is also a transit zone for Central American migrants whose destination is the same. In 2002, the regional police force in Chiapas made nearly 50% of total arrests of foreign migrants without papers, which together with the arrests made in Tabasco add up to 56% of those made in the whole country. If we include Veracruz and Oaxaca, we can see that international migration affects the whole southern frontier of Mexico. The majority of migrants from other countries enter via the Soconusco zone and use the coastal strip of Chiapas as a corridor, where the border posts made 54% of the arrests carried out in 2002. Arrest figures from the National Institute for Immigration indicate that the majority come from Guatemala, Honduras, and El Salvador, representing 56.4%, 25.1%, and 14.6% respectively in 2002.<sup>16</sup>

The growing militarisation of the southern frontier on the pretext of combating drug trafficking, the reinforcement of border control posts, and the proliferation of Central American gangs even within Mexico (such as the *Mara Salvatrucha* or *maras*) together raise the spectacle of an intensification of a series of violations of the human rights of Central American migrants, many of them still minors. This is a matter which should receive more attention from the bodies in charge of protecting human rights.

Finally, though by no means of lesser importance, the S-SE region and some Central American countries are located geographically on the crossroads of the commercial routes between Europe, Asia, and North America. On the basis of the historical experience of the Panama Canal, which was constructed to reduce transport costs between the east and west coasts of the U.S., and the present saturation of the trading routes through the Panama Canal and to the port of Long Beach,

15 See Aída Hernández Castillo, "Las migraciones hacia el Norte en Zona Mam. Nuevas identidades y Nuevos Cruces de Fronteras," paper to the *Seminar on New Identities*, Universidad de Ciencias y Artes de Chiapas, 2004.

16 See Angeles Cruz, Hugo, "Las migraciones internacionales en el Soconusco, Chiapas: un fenómeno cada vez más complejo," *Comercio Exterior* 54.4 (April 2004), México, 312-318.

California, several alternatives have been proposed for multi-modal communication and even 'dry canals' to improve the communication networks and lower the costs of transport to and from North America.

The project for a railroad across the Isthmus of Tehuantepec in Mexico was launched many years ago (in fact the idea was first put out in the last third of the 19<sup>th</sup> century),<sup>17</sup> but dry canals and railroads are options now also being contemplated in Guatemala, Honduras, and Nicaragua. This implies a cluster of massive investments in physical infrastructure (roads, bridges, ports, airports, telecommunications networks, electricity networks, etc.) which at one point the World Bank estimated at a cost of \$20 billion USD every year for the next ten years.

Such investments have subtle territorial implications for sovereignty, security, and administration, as can be seen in the case of Panama, such that it is perhaps one of the most politically delicate points in transnational relations, as much between Mexico and Central America as between the latter and the rest of North America. The PRD (Party of the Democratic Revolution) candidate for the presidency, Andrés Manuel López Obrador, has made explicit his intention to go ahead with the project for the Isthmus railroad.

However within the region, as much as these communication and transport networks facilitate rapid and cheap access to zones currently isolated but rich in resources (forests, fuel, biodiversity), they also raise delicate political problems with the local communities, particularly the indigenous groups, that tend to see such projects with great suspicion since they always imply a direct loss of territory, resources, and means of living, when they already live in a precarious situation.

According to estimates by Sánchez Daza y Martínez de Ita in 2000, 76% of the employed population in Chiapas lives on one minimum wage or less, or simply earn no income, the same income level as that of 72% of the employed population in Oaxaca, 67.6% in Yucatán, 64% in Campeche, 63.9% in Puebla, 62.3% in Tabasco, and 40.4% in Quintana Roo.<sup>18</sup> The states with the highest indigenous population that earn less than one minimum wage are Yucatán, Chiapas, and Oaxaca; those with the highest indigenous population that receive no salary are Chiapas, Oaxaca, and Veracruz.

17 An impressive recount of the long history of this Project can be found in Hipólito Rodríguez, "El Istmo de Tehuantepec y sus Lecturas," *Comercio Exterior* 54.4 (April 2004), México, 296-311.

18 See Germán Sánchez Daza and María Eugenia Martínez de Ita, "El patrón de reproducción global: la integración de los estados del Sureste mexicano," *El Cotidiano* 129 (2005), UAM-A, México, Table 7, 83.



In this respect it is important to mention a key example, given that experts speak of the future of the Usumacinta river basin [which runs along the border between Chiapas, Tabasco, and Guatemala and which is part of the settlement of the Zapatista Army for National Liberation (EZLN)], regarding the use of water to generate electricity, the exploitation of oil reserves, ecotourism, the exploitation of the jungle for genetic material, agricultural cultivation, and water-based activities.

It is not surprising therefore that the indigenous population in the region objects to some of the projects for developing the hydraulic infrastructure, given that for example, in the area of the Usumacinta basin alone, it is estimated that hydroelectric dams will affect 8,700 km<sup>2</sup> of Tabasco lands, and in Chiapas the Quetzalli dam will cover 570 km<sup>2</sup>, the Huixtan I dam 90 km<sup>2</sup>, the Jattza dam 29 km<sup>2</sup>, and the Nance dam 14 km<sup>2</sup>.<sup>19</sup>

To sum up, we can highlight several significant features from the point of view of sectoral specialisation: these states are highly specialised in sectors related to natural resource exploitation, such as oil in Tabasco, Campeche, and Chiapas, petrochemicals in the state of Veracruz, and hydroelectricity in Chiapas, Tabasco, Campeche, and Quintana Roo; meanwhile tourism is important in Yucatán, Oaxaca, Guerrero, and Chiapas; Puebla has the highest manufacturing GDP and the highest sectoral diversification in the region, but almost 70% of the manufacturing GDP is concentrated in just two branches: machinery and equipment (automobiles), and food and drinks.<sup>20</sup> These features have important consequences for the deployment of any regional development plan.

### **IS THE 'ONE SIZE FITS ALL' ECONOMIC POLICY MODEL SUITABLE FOR A BACKWARD REGION?**

From the original diagnosis to the most recent version of the PPP it has been understood that "insertion into the stream of globalisation" consists in opening, privatising, and deregulating, which are the fundamentals of neoliberalism. But in our view, this is exactly what has been keeping the region backward. An enclave-type outward oriented development and its very resource-intensive nature is precisely the model that has been applied historically in the S-SE region, from the oil boom in the second half of the 1970s through to the present day.

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19 See Antonino García García, *Las cuencas hidrográficas compartidas México-Guatemala-Belice: una opción de desarrollo regional*, paper to the Congress of Guatemala Economists, Quetzaltenango, 2004.

20 See Germán Sánchez Daza y María Eugenia Martínez de Ita, Table 4, 81.

To further open, privatise, and deregulate the energy sector, the most strategic of the PPP's initiatives, would imply touching on a very sensitive part of the country's makeup, identity, and long term survival. Furthermore, the PPP's reconfiguration in action goes far beyond regional levels instead focusing on federal levels (the Congress of the Union), and implies radical changes in articles of the National Constitution. This requires a two-thirds majority of Congress votes, which now can only be found between the PRI and the PAN, today at odds in the area of energy reform, even though only the PAN was offering constitutional changes during the most recent electoral campaigns.

The PPP has been presented as a regional development plan that "must be based on planning and coordination." But in the list of priorities there has been no mention of planning anything resembling a policy on agriculture (a very important sector for the indigenous communities in the region), nothing for an environmental policy (unless one includes the effective military occupation of wildlife reserves) despite the area being deeply affected by the insensitive exploitation of its oil (a problem which is taking on the dimensions of a large-scale ecological crisis).

This is not scaremongering: "between 1997 and 2001 alone 1,470 environmental disasters of all scales occurred in Mexico; PEMEX was responsible for 89% of these with the most affected states being Veracruz with 34% of the total, Campeche with 28%, and Tabasco with 27% of all the disasters, which are part both of the principal oil-producing zones and of the S-SE of Mexico (together they account for 58% of all disasters). As if this were not enough, PEMEX was responsible for 57% of the environmental emergencies owing to hazardous substances on a national level."<sup>21</sup>

The indigenous reform approved by the Congress eliminates any legal recognition of the rights of indigenous communities over the natural resources surrounding their communities, so the PPP does not offer anything like a coordination with affected communities. Strictly speaking, the only federal plans made explicit up to now have been plans for construction of road infrastructure and energy interconnection.

Information on the purpose and amounts of expenditures shows that of the almost \$4.225 billion USD destined by both public (which in the documents include multilateral organisations such as the International Development Bank) and private sources of financing to

21 See Nora Lina Montes, *México: la reforma energética y su impacto regional*, unpublished manuscript, paper to the Seminar de las Integraciones Regionales a los Cambios Locales, Economic Faculty, UNAM, June 2005.

projects defined before June 2002, only two of the PPP projects seem to have benefited from significant financial support: the "International Network of Mesoamerican Highways" ('RICAM' in Spanish, agreed to in an 'understanding' signed in July 2002) and the "Mexico-Guatemala Electricity Interconnection."<sup>22</sup>

The first involves almost 9,000 km of a highway network including a 3,159 km Pacific corridor and a 1,745 km Atlantic corridor, plus branches and regional connections adding up to the total figure, noting that not all of these are new constructions but in many cases a question of money for maintenance and improvement work. The cost is \$3.6 billion USD.

A number of important points may be added: in the case of Mexico, the whole Pacific corridor will be financed by the federal government, while in the case of Central America the IDB, the Central American Bank for Economic Integration, the World Bank, and governments such as the Swedish government would all play a part. For the Atlantic corridor, the Mexican section would be paid for by the federal government while again in Central America the IDB, the World Bank, and the Kuwaiti government would pay. There are, however, doubts about the congruency of the figures, since the 'Chiapas bridge' alone, which since December 2003 connects Tuxtla Gutiérrez with the petrochemical corridor of Cosoleacaque and with Mexico City, has been confirmed to have cost \$200 million USD, while the Mexican Department of Transport and Communications admitted that its entire budget for 2002 was \$625 million USD.<sup>23</sup>

The electricity link-up, meanwhile, supposedly had a budget of \$320 million USD, \$250 million USD of which were contributed by the IDB and \$70 million USD by the Spanish government (the project has an estimated value of \$320 million USD). Undoubtedly it is a more transparent project from a financial point of view. As the IDB document about the progress of the Mexico-Guatemala interconnection project dated August 1, 2003 informs us, an investment of \$60 million USD leads to the construction of 80 km of power lines. The resources for the rest of the project are on a much smaller scale.

Up to this point, Vicente Fox's government maintains that it has invested thousands of millions of pesos in establishing a different relationship with the Central American countries. But the PPP has not only been removed from public view in terms of propaganda, but

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22 Information has been taken from Alejandro Álvarez and Gabriel Mendoza Pichardo, "La Infraestructura prioritaria en el PPP y los indicadores de bienestar social en el sur-sureste de México," *Imaginales* 1 (2005), UNISON, México, 28-36.

23 See Vicente Fox Quesada, *Tercer Informe de Gobierno*, México, September 2002.

moreover there is a lack of transparency about the amounts and destinations of governmental actions. This is a very delicate matter if we take into account the number of complaints in Chiapas, Veracruz, Yucatán, and Quintana Roo in the last hurricane season about the lack of support for the devastated communities, the prioritising of economically advantaged sectors, the hiding of goods which had been collected by community organisations in solidarity with the victims, and worst of all, the delays in the delivery of assistance to condition it to electoral ends. In this respect we can see similarities with the attitude of George W. Bush's government towards the victims of the hurricane in New Orleans.

This explains why social resistance against several of the projects associated with the PPP in these and other areas has intensified, such as the recent agricultural workers' protests against La Parota dam in Guerrero. More than 350 social organisations from Central American countries and S-SE Mexican states have openly declared themselves against the PPP and are still actively working throughout the region.

Finally, when it comes to talk of "inserting the region into the stream of globalisation," because imports and exports are overly concentrated in the state of Puebla, a number of questions arise. The S-SE's dominant agricultural products are crops which depend very highly on international markets, such as corn, beans, sugar, rice, bananas, and above all, coffee; while changing perspective and looking at the richness of biodiversity, at least two large national industrial groups — Pulsar and Bimbo — are already exploiting those resources, not to mention the multinationals Nestlé and Coca-Cola which are to be found in every corner of the region. In this sense the region does not need to incorporate itself into globalisation, as this has already happened.

In the case of the region's industries — oil, petrochemicals, electricity, and textiles — these also have strong dependencies on international markets and commodity value chains going back many years. Although in the case of the energy sector, activities are presently dominated by public sector companies, there is a marked concentration of infrastructure in just a few municipalities and urban centers. As we have seen, this has led to accentuated disparities within the region, the pillaging of natural resources, and upsets in the ecological balance not only in urban areas, but even more in coastal zones, ports, and rivers in a region with a very delicate ecology: the humid tropical lands.

Tourism too is highly subject to international currents, precisely because of the region's great natural attractions. Here it is evident that large national and multinational corporations have had more success in marketing the region's archaeological, natural, and architectural attractions than have local or regional companies or communities.



Furthermore, the linear relationship established in the PPP between communications and development remains problematic. A recent study conducted by a student of the Economics Faculty at UNAM has found that from a total of 333,840 km of the Mexican highway system, 31.4% belongs to the S-SE region, paradoxically in Chiapas, the state with the longest road system within the region. Furthermore, highway density for the region is above the national average, with Tabasco and Yucatán twice that size. Correlating railroad infrastructure and HDI, the same study finds that Chiapas is third in road system development while last in HDI. The point then is that the government is investing in the S-SE because these states do not have high specifications as required by an export oriented economy, this is to say, highways with four or more lanes.<sup>24</sup>

We also must consider that there are already privately-run freeways linking several parts of the country, but their benefits have not been reflected regionally. Worse, they represent notable financial catastrophes with grave repercussions in public finances up until the present. In sum, the region's insertion into the stream of globalisation is common currency and its devastating effects are clear to anyone who cares to see them.

To conclude, without explicit public policies, built under consensus with the local communities in all of the above-mentioned areas, it is very difficult to speak of a "strategy of regional development."

Emphasis on sustainable development is the only long term solution to conservation needs in the region, but in such a process it is crucial to accept that only with local populations regaining a central role in resource management will we assure the patrimony and the future of the next generations.

Furthermore, where communities of indigenous groups are expelled by force to change land-use, the result will deepen economic genocide and natural resource depletion, already accelerated with neoliberal economic policies. In mainstream economic theory, "well being" is always measured by increased levels of global production and consumption, ignoring the impact on conservation. As Laura Carlsen said, market based mechanisms promoted by the World Bank to guarantee sustainable development are "essentially a strategy that leaves the wolf to guard the sheep."<sup>25</sup>

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24 See Karla Parma Pardinez, *Políticas regionales, Infraestructura Carretera y Desarrollo Regional: Estudio e Impacto en el Sur-Sureste*, B.A. Thesis, Faculty of Economics, UNAM, Mexico, June 2006.

25 See Laura Carlsen, 52.

The time has come to challenge that view, supporting the peasant economy in organic production schemes, promoting the value of production for local consumption, the respect of traditional knowledge as well as natural resources such as land, forests, water, and biodiversity as collective goods not subject to privatisation. This is not to call for an isolationism nor a "pure and idyllic conservationism" that denies linkages with global markets, but a call to redefine the model for sustainable development under the free trade schemes.<sup>26</sup>

Of course, international coordination should be another important factor, exempting agriculture from "free trade" schemes and WTO regulations, rejecting monoculture agriculture and promoting organic alternatives, stopping the accelerated exploitation of energy resources, enforcing control of CO<sub>2</sub> emissions, strictly regulating bioprospecting, and promoting changes in mega-project expenditure priorities as in the PPP.

26 See Graham Dunkley, *Free trade, Myth, Reality and Alternatives* (London-New York: Zed Books, 2004), particularly chapters 7 and 8.







# Anthropological Perspectives on Environmental Concerns in Rural Mexico Ethnography in the Calakmul Model Forest, Campeche

Julia E. Murphy

## ABSTRACT

The Mexican territory is extremely rich in biological and cultural diversity and thus provides an important and interesting case for examining the relationship between indigenous and other rural communities and environmental conservation initiatives. After briefly reviewing historical and legal factors that shape the relationship between rural communities, land, and resources in Mexico, I will examine the particular case of the Calakmul region in southeastern Campeche. Drawing from the anthropological research I have done on a Canadian "sustainable development" project there, I will discuss the ways in which this project sometimes reproduced and sometimes challenged historically entrenched hierarchical relations between state representatives and *ejido* communities, and between men and women, and left many environmental concerns still to be addressed.

## I. INTRODUCTION

Mexico is a country with tremendous biological and cultural diversity. From coasts to mountains, and from the arid north to the rainy south, an extraordinary range of physical environments is found. In terms of species of plants and animals, Mexico has very high degree of biodiversity. Agriculture has been practiced in Mexico for at least 10,000 years, contributing further to the biological and ecological diversity of the region. The cultural diversity of indigenous groups and

the variety of subsistence and livelihood strategies they have devised through time are equally remarkable.

There are therefore both tremendous incentives and considerable potential for environmentally sustainable development in rural areas. But because many rural Mexicans depend for their livelihoods on soil, water, forests, and other biological resources, and often compete with agriculture, forestry, and mining industries for access to resources, the challenges are daunting. Mexico is therefore an important and interesting case for examining environmental conservation initiatives and conflicts. Much is at stake in terms of the biological and cultural diversity, and so much can be learned from both successful and problematic initiatives. The Mexican case also makes clear that environmental concerns are also ecological, social, cultural, political, and economic concerns, and must be understood in historical context.

This paper therefore begins by explaining what anthropological perspectives contribute to understanding environmental concerns and conflicts in rural areas. It then outlines historical and legal factors that have shaped relationships between rural communities, land, and biological resources in Mexico. The central focus of the paper is the Calakmul Model Forest, a Canadian-funded sustainable development project in the state of Campeche (see figure 1), that I studied from 1996-1998 for the dissertation upon which this paper is based.<sup>1</sup>



Figure 1. Yucatán Peninsula showing location of Calakmul Model Forest, Calakmul Biosphere Reserve, and other nearby Biosphere Reserves (from Murphy 2003a).

<sup>1</sup> Murphy 2003a.

## II. ANTHROPOLOGY AND ENVIRONMENT

Environmental concerns are often considered to be technical questions that fall into the realm of the natural sciences, or the applied branch — environmental management — or to be the result of flawed political or economic systems, and therefore best understood by political scientists or economists. If cultural factors are invoked in discussions of environmental concerns, it is usually with reference to indigenous peoples or because certain cultural ideas are considered backward or obstacles to progress. Anthropological studies, however, that explore people's material relations to their environment — how livelihoods are made in fields, forests, and waters — as well as the cultural values, historical experiences, and political relationships that shape these livelihoods and life-ways — can contribute to a much fuller understanding of the origins of environmental concerns and possible means of addressing them.

Ethnographic research on sustainable development, based on participant observation, interviews, and related research methods, *describes* how development initiatives unfold in complex social and political contexts. It does not *prescribe* how they should unfold, or evaluate their success or failure in reaching development goals. My work in Calakmul drew on recent anthropological research that considers "development" not as a universal project in human advancement, but as the exercise of particular forms of power in specific historical and cultural contexts. Escobar (1995) and Ferguson (1994) interpret the institutions, practices, and discourses of development as ones in which both the agents and subjects of development are actors informed by cultural assumptions and enmeshed in relations of power. Earlier anthropological studies of development focused on the impacts of development projects on so-called local populations, or aimed to make development interventions more culturally sensitive. The newer perspective has been called the anthropology of development.<sup>2</sup>

My study focused on three groups of people differently positioned in relation to the Calakmul Model Forest. These were: the staff of the Calakmul Model Forest; the directors of the Regional Council of X-Pujil (the *campesino* organisation with which the Model Forest worked very closely); and the men and women who were members of *ejidos*<sup>3</sup> involved in Model Forest projects.

2 Grillo and Stirrat 1997:vii.

3 The *ejido* is a complex institution unique to Mexico. According to Whetten (1948:182), "The term *ejido*... refers to an agrarian community which has received and continues to hold land in accordance with the agrarian laws growing out of the Revolution of 1910. The lands may have been received as an outright grant from the government or as restitution of lands that were

But Ferguson's and Escobar's approach to development involves more than a wider definition of what kinds of people should be the focus of ethnographic studies. Working from a Foucauldian perspective, these authors are concerned with the relationship between power and knowledge in the field of development, in the construction of the field and subjects of development. For example, Ferguson notes how, "'Development,' insistently formulated as a benign and universal human project, has been the point of insertion for a bureaucratic power that has been neither benign nor universal in its application,"<sup>4</sup> and Escobar notes that, "With the exception of applied practitioners, anthropologists have shown little interest in the discourses and practices of development, despite the fact that these discourses and practices greatly shape the individuals and communities which constitute the subject of their inquiry."<sup>5</sup>

My study therefore examined how the institutions, practices, and discourses of "sustainable development" came to play in the complex political and cultural field of Calakmul in 1996-1998. In particular, the influx of funds for sustainable development projects in the region, following the creation of the Calakmul Biosphere Reserve, resulted in a regional sustainable development effort that made Calakmul an ideal area in which to investigate how global environmental and feminist concerns had altered notions and practices of rural "development" in one part of Mexico.

One of the contributions that ethnographic approaches to development can make is to "identify struggles and spaces in which important changes can be and are made."<sup>6</sup> In my work I explored the ways in which involvement in sustainable development projects and activities created opportunities for women to promote their interests and/or challenge dominant local gender ideologies, as well as the ways in which this involvement reproduced unequal gender relations.<sup>7</sup>

An important part of the study involved examining the history of state-peasant relations, forest exploitation, and land use in Calakmul, from the early 20<sup>th</sup> century to the present. Since the beginning of the 20<sup>th</sup> century the Mexican state has sought to control land tenure and forest use in Calakmul through various means and for various purposes. The forests had served first as a source of exportable forest products. During

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previously possessed by the community and adjudged by the government to have been illegally appropriated by other individuals or groups; or the community may merely have received confirmation by the government of titles to land long in its possession."

4 Ferguson 1994:267.

5 Escobar 1991b:619.

6 Watts 2001:286.

7 See Murphy 2003b.



the first half of the century forest concessions were granted to foreign and then national interests. Beginning in the 1960s lands were granted to *campesinos* grouped as *ejidos* in a program of *ejidal* colonisation. Relationships between government officials, development workers, and *ejidatarios* in the mid-1990s reflected this history. The historical experiences of people involved in the commercial exploitation of the region's forests and in *ejidal* colonisation shaped their reaction to, and engagement with, sustainable development. For example, one important observation of my study was that, whatever notions the Canadians might have had about how the Model Forest staff would work, these had little influence on the relationships of project staff with the *ejidatarios/as* of Calakmul, and more to do with past practices of rural development in Campeche and in Mexico. And in the case of women in the *ejidos*, although the Model Forest devised projects to involve them, these projects did not address the fact that, historically, women have been for the most part excluded from the *ejidal* assemblies that have the legal authority to direct the activities of *ejidos*.

### III. AGRARIAN HISTORY AND "SUSTAINABLE DEVELOPMENT"

The Mexican Revolution (1910-1917) profoundly altered the political and economic trajectory of the nation. The 1917 Constitution established agrarian reform as a keystone of relations between the state and its citizens. Article 27 gave groups of landless people the right to petition for land to which they had no prior claim and which was granted in the communal form called the *ejido*. It also gave established communities that could demonstrate previous, long-standing, communal use of land and water the means to petition for their rights to be formalised as *comunidades*. Agrarian reform progressed in fits and starts during ensuing decades, altering structures of land ownership to greater and lesser degrees in regions across the country. By the mid-1990s slightly less than 40% of the Mexican territory was held in *ejidos* and *comunidades*. 28,000 *ejidos* had been established, where roughly 3 million *ejidatarios* and their families worked,<sup>8</sup> and well over 50% of Mexico's forested lands were communally held.<sup>9</sup>

There has been ongoing, often ideological debate about communal forms of land tenure and the political structures instituted under agrarian law to govern them, and whether these perpetuate poverty or are a necessary foundation for viable rural communities. What is certain is that agrarian law means *ejidos*, *comunidades*, and

8 Randall 1996:328.

9 Bray et al. 2003:673.

their members have complex, evolving relationships with the Mexican state and its bureaucratic branches, mediated by a range of *campesino* organisations. The revolutionary underpinnings of the agrarian law continue to bear considerable political weight in rural Mexico. The discourse *campesino/as* use to make claims to resources and to assert rights clearly reflect Mexico's post-revolutionary history.

It has also been debated whether communal forms of land tenure create communities motivated to address environmental concerns collectively, or lead inevitably to the so-called tragedy of the commons. Regardless, given the large proportion of Mexican lands held in communal forms and the complexity of the relationship between members of *ejidos* and *comunidades* and the agrarian reform bureaucracy, agrarian politics shape environmental conflicts in rural Mexico. In other words, environmental programs proposed for rural areas dominated by communal forms of land tenure, such as Calakmul, often raise historically charged questions about rights to land and resources, and responsibilities to regulate their use. Agrarian history gives land, as well as forests, water, and other resources, particular and powerful meanings. These differ from the meanings and values associated with them in sustainable development discourse.

"Sustainable development" is the field of development that attempts to reconcile the apparently contradictory goals of development and environmental protection. This field developed as a result of the encounter between western environmentalists and the institutions of development beginning in the mid-1980s.<sup>10</sup> After it was championed by the 1987 report of the World Commission on Environment and Development, *Our Common Future*, sustainable development became the predominant mode through which concerns about global ecology and Third World environments are expressed. The concept of "sustainable development" has guided development projects around the world and in some of its remotest corners, including the Model Forest concept in ten Model Forests in Canada and the Calakmul Model Forest in 1993.<sup>11</sup> It has also been applied to a series of other rural development projects undertaken in Calakmul in the 1990s, to Model Forests elsewhere in Mexico, and in ten other countries.

The disjuncture between agrarian history and sustainable development, as two ways of understanding relations between rural people, the state, and natural resources, is critical to understanding how sustainable development initiatives, such as the Calakmul Model Forest, unfold in rural Mexico. This is not to say, however, that "global"

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10 Adams 1995.

11 Beyers 2001.

environmental perspectives have no resonance in rural Mexico, or that environmental concern is necessarily and always in opposition to agrarian rights. The concept *ecología productiva* that guided the planning of the Model Forest is an example of an effort to bring the two perspectives together,<sup>12</sup> and social action based on environmental concern has taken different forms in different parts of Mexico.<sup>13</sup> Nevertheless, the disjuncture has not always been recognised by international and internationally-funded environmental actors that have attempted to implement programs based on concepts of sustainable development originating from other political contexts. This was certainly the case in Calakmul,<sup>14</sup> where the influence of "global" environmental funds and perspectives can be traced through time.

#### IV. NEOLIBERAL AND ENVIRONMENTAL REFORMS

National and international attention came to focus on Calakmul's extensive tropical forests as Mexico entered the negotiations that led to the signing of the North American Free Trade Agreement (NAFTA) in 1993. In the context of those negotiations, Mexico sought to demonstrate its commitment to addressing both deteriorating environmental conditions and security concerns about its southern border. The creation of the Calakmul Biosphere Reserve in 1989 was a central element of President Salinas de Gortari's effort to improve Mexico's environmental reputation in the international arena.<sup>15</sup> With an area of 723,185 hectares, the Reserve is one of the largest protected natural areas, and the largest area of protected tropical forest, in Mexico. During the same period, and for similar reasons, Mexico was implementing a set of neoliberal reforms that included liberalising markets, the sale of nationally-owned enterprises, the privatisation of government services, the end of agrarian reform, and the reduction of state-provided services in rural areas.<sup>16</sup> Changes to Article 27 of the Constitution through the 1992 Agrarian Law of Mexico not only ended the distribution of land but also gave *ejidatarios* the legal right to sell, rent, sharecrop, or mortgage their land, as well as to enter into joint ventures with private entrepreneurs.<sup>17</sup> The PROCEDE program<sup>18</sup>

12 See Minister of Supply and Services Canada 1994a.

13 See Simonian 1995.

14 See also Haenn 2005.

15 Dauzier 1999.

16 Dresser 1991.

17 DeWalt, Rees, and Murphy 1994.

18 *Programa de Certificación de Derechos Ejidales y Titulación de Solares Urbanos*/ Program for the Certification of *Ejidal* Land Rights and the Titling of Urban House Plots.

divided all or part of many *ejidos* into parcels to which *ejidatarios* were given individual title. These changes were intended to foster investment of capital and technology in the *ejidal* sector and revitalise rural economies.

The environmental measures introduced by Salinas de Gortari included programs to improve air quality in Mexico City<sup>19</sup>, a national reforestation campaign, a ban on the commercial hunting and uses of marine turtles, the creation of protected natural areas, including the Calakmul Biosphere Reserve,<sup>20</sup> and two major revisions of the environmental law (*Ley General de Equilibrio Ecológica y Protección al Ambiente*).<sup>21</sup> Critics have argued that these measures, although responding to concerns expressed in Mexico, were primarily a response to international pressure and not a definite commitment of the state to addressing environmental degradation through transforming the dominant development model.<sup>22</sup>

Noting the apparent contradiction between environmental and neoliberal reforms, Vásquez-León described how they were linked in efforts towards "gaining acceptance as a fully integrated partner in the global economic order."<sup>23</sup> Together they became central elements in the process of economic and political "modernisation" Mexico has undergone since the late 1980s. In rural areas changes to agrarian, forestry, and water laws were central. Bray noted that, "The reforms to the land tenure regime were not first and foremost an environmental measure, although the supporting legislation, notably the new forest and water laws, take on a more explicitly environmental tone."<sup>24</sup> Proponents of the new agrarian laws had argued that changes to *ejidal* tenure, through fostering greater investment in, and increased productivity of, *ejidal* lands, would create greater incentives to address environmental degradation. In other words market incentives, restrained by the new forestry and water laws, were expected to encourage resource conservation and attention to environmental concerns.

Reforms undertaken at the federal level often play out in quite varied and unusual ways in peripheral regions like Calakmul. There, effects of environmental reforms were felt primarily in relation to the

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19 Air quality in Mexico City is such an important focus of environmental concern in Mexico, and that city has such a hold on the country's media, that air quality sometimes seem to define environmental concern for the whole country. On several occasions residents of Calakmul described environmental benefits of the Biosphere Reserve to me in terms of improvements to local air quality, even though air contamination is very low, except locally, at the end of the dry season, when farmers burn their fields in preparation for sowing corn.

20 Simonian 1995.

21 Mumme 1992.

22 Mumme 1992.

23 Vásquez-León 1999:233-34.

24 Bray 1996:215.



creation of the Biosphere Reserve, and those of neoliberal reforms most directly in changes in the delivery of government services. The *Solidaridad* programs associated with the Salinas de Gortari presidency,<sup>25</sup> most of which required local labour and social organisation, were ubiquitous, and the subsidy to corn farmers, PROCAMPO, seemed a mere pittance to many. Because almost all *ejidal* lands in Calakmul are designated as lands best suited for forests and forestry activities, few *ejidos* there were eligible to be divided into individual plots and lands must continue to be held in common. As a result some changes to the Agrarian Law had almost no impact. Although it is difficult to separate effects of the various reforms in a single location, I would argue that in the case of Calakmul, it was the presence of internationally-funded "integrated conservation and development" projects through the 1990s that had the greatest impact. Not only was southeastern Campeche symbolically transformed from a forested frontier to an area of global environmental significance, but new forms of organisation and new activities were introduced in many of the region's *ejidos*.

## V. "INTEGRATED CONSERVATION AND DEVELOPMENT" IN CALAKMUL

In the first half of the 20<sup>th</sup> century southeastern Campeche had been a sparsely populated border area, important as a source of *chicle* (a tree resin used to make chewing gum), mahogany, and other forest products. Beginning in the 1960s, the federal government promoted agricultural colonisation in the region by granting *ejidos* to landless *campesinos* from across the country. Poor and in some cases desperate, they accepted grants in southeastern Campeche. Although the lands are relatively unproductive and poorly supplied with water, the relatively large size of the land grants compensated to some extent for their quality. By the mid-1990s the region had a culturally heterogeneous population estimated between 15,000 and 20,000 people, from the states of Campeche, Yucatán, Quintana Roo, Tabasco, Veracruz, and Chiapas, living off of small-scale agriculture and animal husbandry, beekeeping, forestry activities, small businesses, and government make-work programs.

After the creation of the Biosphere Reserve, approximately seventy-two *ejidos* located around the edges of the reserve became the focus of a set of initiatives intended to make Calakmul a national and international showcase of sustainable development. Most projects

25 Dresser 1991.

reflected current thinking that protection of natural environments should not be undertaken at the expense of local communities, but instead should enlist their support by demonstrating the economic and other benefits of conservation.

As mentioned at the outset, indigenous people in Mexico have historically been both vulnerable to pressures on natural resources and resourceful in adapting to change. It is estimated that one quarter of the population of Calakmul is indigenous. The largest groups are Yucatec Maya speakers from the peninsula and Chol and Tzeltal speakers from Chiapas. Many people unfamiliar with the area believe it is predominantly Yucatec Maya. Indeed Calakmul is part of the Selva Maya, a conservation initiative involving biosphere reserves and forests in the adjoining areas of Mexico, Belize, and Guatemala (see figure 1). Innumerable Maya archaeological sites, including the ancient city whose name is used for the whole region, also contribute to Calakmul's aura of "Mayaness," and are used to promote luxury and eco-tourism. This simplification belies the cultural diversity of the region's population, regional identities (including Tabasqueño/a, Veracruzano/os, Campechano/a, and Chiapaneco/a), the importance of interethnic relations in the local political dynamic, and, indeed, the broad range of cultural traditions that influence social relations within and among *ejidos*, patterns of natural resource use, and forms of political participation.

#### "Una Reserva Socialmente Ocupada"

When the creation of the reserve was announced concerns were immediately raised in the national press about how local residents would be affected. An article in *La Jornada* pointed out that Calakmul was a "socially-occupied reserve" (*una reserva socialmente ocupada*) and asserted the need for full recognition of the agrarian rights of the people whose *ejidal* lands lay near, and in some cases inside, the reserve. In fact, the decree creating the reserve did not address the fact that *ejidal* lands make up 50% of its area. According to one source, there were thirty-one settlements within the reserve when it was created.<sup>26</sup> As a result, several *ejidos* protested against the reserve. Several groups of people who were living in the centre of the reserve agreed to be relocated, with the promise of better services in a new site. The forestry extension of the *ejido* of Dzibalchen was purchased by the state. Two *ejidos* whose lands fall partly inside the reserve boundaries refused to be relocated and mounted a legal challenge. In 1993 the case was resolved

26 Bufete Jurídico "Tierra y Libertad" A.C. 1997.

in their favour. Even those whose rights were not so directly threatened feared that government authorities would impose stricter regulation of forest uses, especially hunting.

Despite these legal conflicts and uncertainties, once established the reserve began to attract Mexican and international funding for rural development projects with an environmental focus. These projects used a variety of terms to describe their particular approaches. Mexican funders used the terms "productive ecology" (*ecología productiva*), while World Bank-funded groups used "integrated conservation and development," and "community-based natural resource management." These approaches were also influenced by reforms to federal environmental laws that promoted citizen participation in environmental decision-making and linked development and environmental goals.<sup>27</sup> The federal Environmental Protection Law of 1988, for example, states that where there are protected natural areas, the Ministry of the Environment, Natural Resources, and Fisheries (SEMARNAP) has the responsibility to:

[...] promote the participation of the inhabitants and land-holders, local governments, indigenous peoples, and other public and private social organizations, with the goal of fostering community development and assuring the protection and preservation of ecosystems and their biodiversity.<sup>28</sup>

The arrival of environmental NGOs and the establishment of a regional *campesino* organisation, the Regional Council of X-Pujil (*Consejo Regional Agrosilvopecuuario y de Servicios de X-Pujil*), did increase possibilities of political participation for some people.

Calakmul has a reputation as a Mexican conservation success story, recognised for the serious commitment made to working with local residents towards the goal of sustainable resource use (rather than strict "conservation"); new opportunities for, and new kinds of, political participation; and the relatively high degree of local acceptance of the reserve. The reality is of course more complex than this assessment would suggest. Later in this paper I will present some of the results of my observations of relations between project staff and *campesinos* and of the efforts of women to "participate" in this new context.

The Calakmul project was ambitious and well-funded, but certainly not the most radical, or even innovative, regional environmental proposal in Mexico. Critics have noted the contradictions and superficiality of some of the forms of participation promoted. Salinas de Gortari's presidency was, of course, marked by

27 Mumme 1992:135.

28 Bufete Jurídico "Tierra y Libertad" A.C. 1997:12.

the challenge to continental economic integration of the Zapatista uprising that began in 1994. The EZLN called for political, cultural, and territorial autonomy, the recognition of indigenous cultural and political rights, and the end to the poverty and marginalisation in which so many Mexicans live. The proposals for Calakmul clearly posed much less of a challenge to state authorities and institutions.

For the Chimalapas region of northern Oaxaca, bordering the state of Chiapas and Veracruz, Umlas (1998) describes considerable opposition in the early 1990s to the idea of establishing a biosphere reserve. ProNatura – an NGO also active in Calakmul – promoted the reserve, but a network of indigenous and environmental groups called instead for immediate resolution of agrarian conflicts, changing the route of the federal highway proposed to pass through the area, and the cancellation of logging permits given to two large companies. Ranchers supported the biosphere reserve idea; the governor of Chiapas called for an ecological reserve, and the network for a *campesino* ecological reserve. Each of these proposals represented a distinct way of configuring relationships between *ejidatarios*, other landholders, private interests, and branches of the government, lands, and resources.

In fact, models proposed by NGOs to state authorities and the Regional Council met little resistance in Calakmul. When I started my work in Calakmul in 1996, the following agencies and organisations were funding conservation and development projects there: the Calakmul Biosphere Reserve; *Instituto Nacional Indigenista* (INI); *Secretaría de Desarrollo Social* (SEDESOL); *Secretaría de Medio Ambiente, Recursos Naturales y Pesca* (SEMARNAP); *ProNatura Península de Yucatán* (PPY), World Wide Fund for Nature (WWF) Mexico; the World Bank's Global Environment Facility (GEF); U.S. Agency for International Development (US-AID)'s Biodiversity Support Program, and Environment Canada. Support was also provided by a number of research institutions, including the University of Campeche's *Programa ECOMAT*, *Comisión Nacional para el Conocimiento y Uso de la Biodiversidad* (CONABIO), Stanford University's Centre for Conservation Biology, and the International Centre for Research on Agroforestry. \$2 million USD annually is a conservative estimate of the amount of money destined for Calakmul during the period 1992-1996. The two largest projects were ProNatura's and the Calakmul Model Forest.



### The Calakmul Model Forest

This organisation, a joint initiative of Environment Canada and the Mexican Secretary of Environment and Natural Resources, was intended to create "a model of sustainable development... [and] set an example for other tropical areas."<sup>29</sup>

The Model Forest concept was developed in Canada in the early 1990s as part of Environment Canada's *Green Plan*, a response to public concern about the environment and to the 1987 report of the World Commission on Environment and Development, *Our Common Future*. Ten Model Forests were established in Canada, instituted as, "independent, legally incorporated non-profit organisations directed by a representative group of multi-stakeholders of the forest resource,"<sup>30</sup> and each comprising:

[...] both a geographic area and a specific partnership-based approach to sustainable forest management... A model forest is also a voluntary partnership whose members fully represent environmental, social and economic forces at play within the land base. The partnership works to define a shared, locally relevant vision of sustainable forest management, and then works to translate that vision into concrete terms for the benefit of all stakeholders (<http://www.idrc.ca>).

The Model Forest program was presented by the Canadian delegation to the United Nations Conference on Environment and Development in Rio de Janeiro in 1992. Then Canadian Prime Minister Brian Mulroney announced that Canada had successfully established the Model Forest program as a means of promoting sustainable forestry, and was willing to assist other nations in adopting it. Mexico, Russia, and Malaysia were the first to become involved.<sup>31</sup> The Calakmul Model Forest was one of the first Model Forests established outside Canada, in 1993, and the first of three in Mexico. The Chihuahua Model Forest followed later the same year, and the Monarch Butterfly Model Forest, in the states of Michoacán and Mexico, in 1997. By 2001 there were Model Forests in ten countries, including Canada, coordinated through the International Model Forest Network Secretariat in Ottawa.<sup>32</sup> In September 2002, in his address to the World

<sup>29</sup> Minister of Supply and Services Canada 1994a.

<sup>30</sup> Patry 1997:5.

<sup>31</sup> Patry 1997:5.

<sup>32</sup> The stated objectives of the International Model Forest Network are: "[1] to foster international cooperation and the exchange of ideas relating to the concept of sustainable forest management, [2] to support international cooperation in critical aspects of forest science that underlie the search for new models of forest management; and [3] to support ongoing international discussions on the criteria and principles of sustainable development." Minister of Supply and Services Canada 1994b:2.

Summit on Sustainable Development in South Africa, then Prime Minister Jean Chrétien renewed Canada's commitment to the International Model Forest Network and announced continued funding for the Network as one of Canada's contributions to global environmental efforts. In June 2006, forty-one Model Forests in eighteen countries were listed by the Network as members.<sup>33</sup>

The political motivations that led to the establishment of the Calakmul Model Forest are clearly very similar to those that led to the creation of the Calakmul Biosphere Reserve. With Canada's forest industries under national and international scrutiny, and rates of deforestation that had led it to be called "the Brazil of the North," Canada, like Mexico, wanted to demonstrate its commitment to addressing both domestic and global environmental concerns.

## VI. ANTHROPOLOGY OF DEVELOPMENT IN CALAKMUL: ORGANISATIONS, LABOUR, AND GENDER

This section describes three important dimensions of sustainable development: the organisations involved, use of *campesino* labour in development projects, and women's "participation."

### Two Organisations: Model Forest and Regional Council

Sustainable development in Calakmul was implemented through a number of organisations set up and funded for this purpose, including the Calakmul Model Forest and the Regional Council of X-Pujil. The proposal for the Calakmul Model Forest was chosen over others in part because the Regional Council was the kind of local organisation representing interests in the forest, or stakeholders, that is central to the "multistakeholder planning" principles of the Model Forest model (Beyers 2001). The Regional Council brought together and represented *ejidatarios* and *campesino/as* living in the Calakmul region. (How well and how democratically it did this is an important question, but it was definitely, at the time, the largest and best-organised *campesino* organisation in the region). The Council grew in importance as it took on implementation of sustainable development projects in its member

33 In Mexico, however, transformations of the federal government's forestry programs following the election of Vicente Fox Quesada in 2000 shifted priorities in Mexico's Model Forest program. Presently neither the Calakmul nor the Chihuahua Model Forests is receiving funding, while the Monarch Butterfly Model Forest is, and a new one, the Sierra La Quila Model Forest, is being developed in the state of Jalisco. Despite these activities, Mexico is not currently participating in either the International Model Forest Network or the Regional Model Forest Network for Latin American and the Caribbean.

*ejidos*. Among the organisations in Calakmul with which it worked, its most enduring relationship, however fragile, was with the Model Forest. Figure 2 illustrates the structure of the two organisations and their relationship to each other and to the *ejidos* that were the official objects of their concerns.

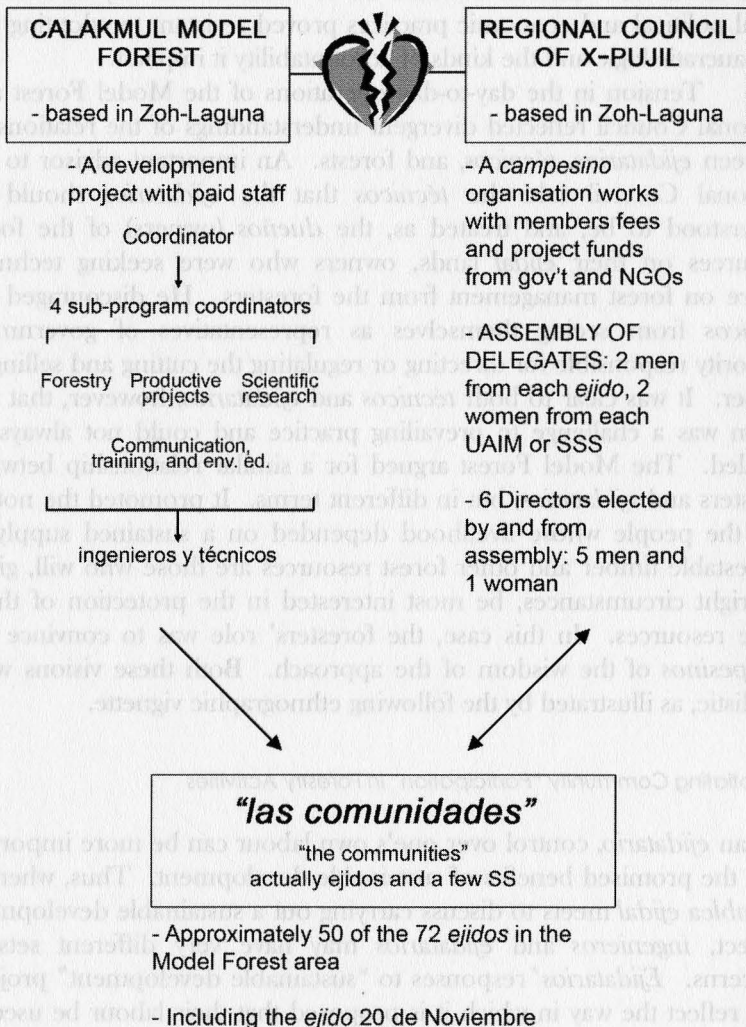


Figure 2. Organizational Structures of the Calakmul Model Forest and the Regional Council of X-Pujil (from Murphy 2003a).

The Model Forest had a bureaucratic vision of relations between *campesinos* and development project staff. There was a work plan; funds were intended to be disbursed according to an approved budget; and staff members were expected to perform specific tasks outlined in job descriptions for salaries, in cooperation with the beneficiaries of the project and their democratically elected political leaders. It would seem that the Canadians who set up the project were naïve about how difficult it would be to work in this way in Mexico. Local political and economic practices proved resistant to adopting this bureaucratic logic and the kinds of accountability it implied.

Tension in the day-to-day operations of the Model Forest and Regional Council reflected divergent understandings of the relationship between *ejidatarios*, *técnicos*, and forests. An important advisor to the Regional Council told the *técnicos* that the *ejidatarios* should be understood to be, and treated as, the *dueños* (owners) of the forest resources on their *ejidal* lands, owners who were seeking technical advice on forest management from the foresters. He discouraged the *técnicos* from seeing themselves as representatives of government authority responsible for directing or regulating the cutting and selling of timber. It was clear to both *técnicos* and *ejidatarios*, however, that this vision was a challenge to prevailing practice and could not always be fulfilled. The Model Forest argued for a similar relationship between foresters and *ejidatarios*, but in different terms. It promoted the notion that the people whose livelihood depended on a sustained supply of harvestable timber and other forest resources are those who will, given the right circumstances, be most interested in the protection of those same resources. In this case, the foresters' role was to convince the *campesinos* of the wisdom of the approach. Both these visions were idealistic, as illustrated by the following ethnographic vignette.

#### Negotiating Community "Participation" in Forestry Activities

For an *ejidatario*, control over one's own labour can be more important than the promised benefits of sustainable development. Thus, when an *asamblea ejidal* meets to discuss carrying out a sustainable development project, *ingenieros* and *ejidatarios* may have very different sets of concerns. *Ejidatarios'* responses to "sustainable development" projects may reflect the way in which it is proposed that their labour be used in its implementation, rather than their views of more abstract notions of participation and sustainability.

The Model Forest foresters regularly attended *ejidal* assemblies to discuss forestry activities on *ejidal* lands and reach agreements with



the *ejidatarios* as to how these were to be carried out. According to the Agrarian Law, the *ejidal* assembly is the forum where *ejidatarios* make collective decisions.<sup>34</sup> The foresters may attend either special assemblies called to discuss a particular event or issue, or the regular assembly held on the last Sunday of every month, the *asamblea del fin de mes*. The *ejidal* assembly comprises all the *ejidatarios*, in their roles as male heads of household, and any women *ejidatarias* the *ejido* may have. (In Calakmul these are usually widows of *ejidatarios*).

On the afternoon I attended a special assembly in the *ejido* Dos Lagunas Norte, the *ejidatarios* had gathered to organise work teams to assist the foresters with a forest survey on their lands. The discussion focused on how many *ejidatarios* were needed and for how long; only one question was asked about the nature or purpose of the work involved. On this occasion the *ejidatarios*' principal concern was not forest use and management practices on their *ejido*, or even eventual profits from timber cutting, but the use of their labour. Their reaction suggested that they were willing to comply with the request of the foresters, as long as it was reasonable, but that they viewed this as something of an imposition rather than part of a process they were fully involved in.

I observed similar discussions in other assemblies. The concern with the use of *ejido* labour can be partly explained by the historical experience of older *campesinos* working as *peones*<sup>35</sup> on henequen (sisal) haciendas in the northeastern part of the peninsula, or under exploitive conditions in the chicle industry in Campeche, or on coffee plantations in Chiapas.

Another possible explanation is the tendency of so many government programs in *ejidos* – not just those related to sustainable development – to be invariably framed in terms of benefits to the community, to insist on community “participation” regardless of how *ejidatarios* perceive the benefits. As a result, they are reluctant to agree to the use of their labour when other components of the project may or may not materialise, in response to factors beyond their control. But they are also reluctant not to be involved in the projects because of the importance of maintaining patron-client relationships with individual *técnicos* and *ingenieros*, and with the agencies and organisations they represent. Through these processes, forest deterioration and other

34 The ideal of the *ejidal* assembly as a democratic community forum, however, is belied by the networks of power that exist in all *ejidos*, and by the inequalities between members, based on hierarchies of wealth, age, ethnicity, and, in particular, gender.

35 The term *peones* (peons in English) is sometimes used in the present to refer to manual labourers; for example, men who are hired to clear the brush on the sides of roads and highways with machetes.

environmental concerns are sidelined in the complex interplay between development workers, organisations, and beneficiaries.

### Women's "Participation"

Sustainable development in Calakmul was very clearly a gendered phenomenon, one in which men and women played very different roles. Despite the important conclusions of the many studies that have been made of "women and development" around the world, the importance of gender as a dimension of social relations continues to be neglected in many studies of rural Mexico. Agarwal has argued that despite all the accumulated evidence that gender is such a significant dimension of development, "gender continues to be viewed as an issue of 'special interest,' whose incorporation into development analysis and program interventions has been piecemeal at best."<sup>36</sup>

A confluence of global, national, regional, and local factors both created and constrained opportunities for women in Calakmul. In the case of the Calakmul Model Forest, the involvement of women in the activities of the Model Forest and Regional Council was an *unintended* consequence of sustainable development. Most Western development assistance agencies now require attention to gender from the very first steps of project design and such policies have influenced the way most internationally funded projects, and some Mexican projects, have been implemented in Calakmul. But because funding for the Canadian Model Forest program originally came from Environment Canada, not CIDA, the Calakmul Model Forest was not required to follow CIDA's, or any other body's gender policy.

From a historical experience of marginalisation from rural and agrarian politics, women challenged the Model Forest and Regional Council's projects and practices and drew attention to the material difficulties of the lives of their families. But even though the political spaces for women created in the context of the regional sustainable development program were used by women to promote their interests, they also sometimes served as spaces in which dominant gender ideologies and unequal gender relations were reproduced.

A critical point, related to the earlier discussion of the disjuncture between agrarian history and sustainable development, is the place of women in *ejidos*. Until 1971 holders of ejidal rights (*ejidatarios*) could only be male heads of household, their sons of marriageable age, or the widow of an *ejidatario*. After 1971 a woman raising children on her own for any reason could also become an

*ejidataria*, but in Calakmul few such women have claimed *ejidataria* status. Thus the presumption is that male heads-of-household can, and do, democratically represent the interests of all members of their families persists.<sup>37</sup> Stephen notes how:

[t]he historical gendered dynamics of *ejido* law and organization in Mexico are consistent with a cultural ideology that subordinates women's decision-making to men and sees women as having their interests represented by male family members.<sup>38</sup>

In other words, she concludes, the Agrarian Law enshrined post-revolutionary patriarchal family structures and values. This fact has been critical in shaping the ways women in rural areas dominated by *ejidal* land tenure, such as Calakmul, have organised politically and participated in sustainable development projects. I often heard it said in Calakmul, by both Mexicans and foreigners, that women's marginalisation from formal *ejido*-level decision-making reflected *campesino* or indigenous cultural values. But women's legal position within the *ejido* has as much to do with laws made in Mexico City in the early 20<sup>th</sup> century as it has to do with cultural patterns of kinship and inheritance, which in fact vary and have varied considerably across Mexico and through time.

When I interviewed women political leaders about their experiences of participation in sustainable development related initiatives, they often used the terms of sustainable development discourse to describe their needs, and they justified their needs in terms of their family roles as mothers.

Doña Edelmira Jiménez, originally from the state of Tabasco, was one of the first women to participate in the Regional Council as an official delegate of her *ejido* and the first woman to become a director of the Regional Council. After leaving that position she continued to be outspoken in the Council's assemblies. During our interview, I asked Doña Edelmira what women had achieved through their participation in the Regional Council. She described the obstacles the women had faced, including the opposition of their husbands, sometimes expressed through physical violence, but said that there had been benefits. Some women had been able to improve their economic situations; they had a bit more money to improve their children's diet and health and to provide them with clothing and the other things that they needed to continue attending school.

37 Stephen 1997.

38 Stephen 1997:171.

When I asked her if the women's perceptions of themselves had changed, if they had more self-confidence, or if they had different ideas about what kinds of work they could and could not do, "Oh yes, definitely," she replied, "some women now have eight or nine cows." Women in San Antonio Soda had not owned cattle before, and any woman who owns a herd of cattle, however small, would likely be more self-confident, as well as wealthier.

Edelmira told me that despite the difficult conditions in which they live it is possible for women to improve their situation. She described with great enthusiasm the difficulties she had faced in getting to meetings with women in other *ejidos*: "It didn't matter to us if it rained. If the trucks got stuck in the mud, we walked into the villages, through the forest and through the rain, and didn't care one bit, even if we didn't get home until the middle of the night."

The biggest obstacle to women trying to meet their needs, Edelmira said, was their lack of liberty (*libertad*). Not all women had the same degree of liberty that she had, although achieving it had come at a cost, sometimes black eyes, but *me vale*, I don't care, she said.

What motivates us are our needs. I have seen that when I have had a little bit of work and make a few cents, I can buy things for my children, crackers, bread in the evening and the next day they don't have to eat just beans and rice, they can have egg or something else with it. This is why we need work, to be able to defend ourselves a little bit, this is why we need to be supported with training in handicrafts.

I was struck by her complaint about women's lack of liberty and her call for the kinds of projects the women had already been offered. The handicrafts projects did not challenge the cultural restrictions on women's movements and had generated relatively little income for them.

In a similar vein, Doña Carmen Salgado, originally from the state of Veracruz, explained to me that when women organise themselves into groups they are able to obtain more *cosas* (things), *apoyos* (financial and material support) and *proyectos* (projects). Both these women leaders articulated women's interests using the terms of development discourse, drawing attention to their needs for the kinds of opportunities they had previously been offered by development institutions.

So why, I asked Edelmira, are men so opposed to the women doing these kinds of things:

It's not that they are opposed to us, it's that they don't give the women liberty to work outside, to leave the village. They are not opposed to the women working, but it has to be here in the village. [Otherwise] the children get left



alone in the house, our belongings are unwatched. The husband too is left on his own. So that's why they don't want their wives to be gone all the blessed day, two days, three days. They've seen that when we have been working here in the village, well, even they benefit. But at first it was hard for us, because they didn't agree. They said we were crazy, that we weren't going to get anything, that no one was going to listen to us... The first few women that tried, well, the other husbands saw that we had obtained results and then they gave permission for their wives to participate with us, and now we've gone to conquer the *compañeras* in the other *ejidos*, who were living in peace before. [Laughs].

Edelmira and other women leaders told me about the difficulties they also faced in their work as directors of the Regional Council, difficulties posed by the necessity of working together with their male counterparts, and created by these men, their own husbands, and other women. It is a very delicate task for a woman to manage her personal reputation while involved in political work.

Doña Carmen explained to me that it is just not the same for women in rural areas as in the city. In Calakmul, she said:

If a woman goes out, if a woman is going around with the *compañeros* (men), *hijole*, all the world is criticizing you, they don't believe that you are going around working. They gossip. A woman has to have a good dialogue, good communication with her husband to be able to travel where we have to travel, and we have all been through big conflicts because of this.

In Calakmul, as in other parts of rural Mexico, there is a strongly gendered division of space. Transgressions leave women open to criticism from both men *and* women, as Doña Carmen pointed out.

Edelmira, Carmen, and other women leaders were engaged in local politics with clear goals and the desire to fight for them. Our conversations showed how they engaged with the Regional Council, the Model Forest, and other institutions in terms of claiming rights as women and mothers to supports, projects, and training, while managing their reputations.

The involvement of women in the assemblies of the Regional Council of X-Pujil represented a significant departure from rural development practice that had previously excluded women from *campesino* organisations. Given the opportunity to participate in the assemblies and on the board of directors, several women were extremely vocal in advocating for women and occasionally criticised their male counterparts openly. In these ways and others women can be seen to have actively occupied, and sometimes tried to expand, the political spaces opened for them in the regional sustainable development project in Calakmul. Such efforts, however, were made in the face of a persistently male-dominated political culture and unequal gender relations within their own families and homes. The Model Forest's

projects for women did not directly challenge dominant local gender ideologies, the gendered division of labour, or the marginalisation of women from *ejido* level decision-making. The implementation of the women's projects, in many cases, followed the populist logic characteristic of rural development in Mexico. The combination, however, of women's involvement in the Regional Council and of projects for women in the *ejidos* did expand their possibilities.

## VII. CONCLUSION

In the early 1990s a new era began in Calakmul, one in which the importance of the region's forest was redefined in global, ecological terms, and *campesino/as*' relations to forests on their *ejidal* lands were recast in the terms of sustainable development. And yet, during the electoral campaign for state governor in 1997, while I was finishing my research, political discourse about Calakmul began to shift. The outgoing PRI governor had described Calakmul in terms of its potential for sustainable development and biodiversity conservation and the economic benefits these would bring. But the party's gubernatorial candidate, the eventual governor, described the region in his campaign speeches as impoverished and in dire need of government services and infrastructure, never mentioning the potential environmental impacts of infrastructure projects. In describing the problems of Calakmul in this way, he offered yet another vision of the relationship between the state, *campesino/as*, and the region's forests, and a shift away from the politics of sustainable development.

Although Mexico has sometimes been portrayed as particularly impervious to foreign cultural influences, my work suggests how "global" environmentalism and feminism did, to a certain degree, transform rural development practices in Calakmul. The Calakmul Model Forest introduced a model of sustainable development centred on multistakeholder planning. This model was neither successfully adopted nor entirely rejected in Calakmul, but like other related development institutions, practices, and discourses, it was reworked and transformed into a particularly Mexican model. Multistakeholder planning became the Regional Council and Model Forest staff working together to implement sustainable development projects in the *ejidos* of Calakmul, sometimes following a formal work plan and sometimes not. This arrangement of relations between *campesino/as* and development project staff resembled those of previous rural development projects in Mexico more than they resembled the Model Forest concept developed in Canada. It also reproduced the kinds of social relations that have

historically characterised rural development initiatives in Mexico. In another kind of analysis, the work practices of development project staff might have been considered incompetent, or not-yet modern, or simply corrupt. In other words, the legacy of hierarchical, clientelistic relations between representatives of government agencies and *ejidatarios* – as well as among representatives, *ejidatarios*, and their female counterparts – could not be shaken off by re-imagining them as stakeholders who would work together to build consensus on the best ways to use the region's forests. The problematic results of the Model Forest's attempts to do this points to the cultural specificity of the social relations of development and the resilience of local understanding of "development," derived from accumulated experience.

One of the most surprising observations of this study is how the image of the Calakmul Model Forest projected from Ottawa and Mexico City avoided any mention of the problems that it encountered. The structure of knowledge on which public portrayals of this development project rested was remarkably impervious to challenges by the *ejidatario/as* of Calakmul (to say nothing of my anthropological analyses). The Model Forest is described in positive terms as a successful, ongoing project on the website of the International Model Forest Network. This is one of the implications of the political and economic structure of development assistance and knowledge. There is some coverage in the newspapers in Campeche of political events in Calakmul and misuse of funds does not pass unnoticed by a broader Mexican public. But where are other visions of future possibilities for Calakmul? Such firm control of representation of sustainable development does not serve the interests of its so-called beneficiaries, because it too reproduces the hierarchical relationships that have historically characterised government interventions in the *ejidal* sector. It also prevents better understanding and more productive discussions of the relationship of forests and "the environment" to improving the lives of men and women in rural Mexico.

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# Indigenous Movements in Mexico Impasse or Forward Motion?

John Gledhill

My first ethnographic study in Mexico was of the people who worked on a gigantic landed estate or *hacienda* before the revolutionary land reform: they saw themselves as mestizos and often used the disparaging diminutive “inditos” to refer to people from the neighbouring P’urhépecha indigenous communities of the highlands. Ironically, many of these ex-*peones* descended from the numerous Africans and mulattos brought into the region to work on the sugar haciendas. But they could not recognise this element in their historical identity, since as migrants to the U.S. they had become antagonistic to Afro-Americans. This is one, less attractive, side of transnational relations. But it is symptomatic of other political effects of globalisation that the new millennium witnessed the birth of *black* identity politics in some Afro-descendent communities on the coast of Guerrero state. As in the case of Colombia, where black movements have become far more extensive, we could see these new developments as a reflection of the impact that indigenous movements have had over the last couple of decades and in particular of the recognition that indigenous demands have received from national governments and multilateral agencies such as the International Labour Organization and the World Bank. They also reflect the increasingly significant role that NGOs are now playing as mediators between grassroots movements and national and supranational institutions of governance. Indigenous rights movements do, however, also seem to reflect a historically rooted sense of identity. One of the most important questions we need to ask about Mexican history is how and why some Mexicans and not others preserve that identity.

## LOCATING INDIGENOUS PEOPLE IN CONTEMPORARY MEXICAN SOCIETY

The vast majority of Mexicans today do not, of course, see themselves as indigenous. Three quarters of them now live in urban not rural places,

and a substantial minority gain their livelihoods by crossing international frontiers as migrants. Migrant remissions are now Mexico's largest source of foreign earnings. If we do not start with those basic facts, we will not reach an adequate diagnosis of the significance of, and challenges facing, Mexico's indigenous movements today. Indeed, we will fail even to understand the contemporary situation of indigenous people themselves, since millions of them now live and work in major cities and migration of various kinds is extensive.

Some indigenous people work in agribusiness in Mexico. Much of this movement is from South to North. Indigenous workers replace local mestizo labourers who have moved on to focus exclusively on work in the U.S. One of the best-known examples of the domestic migration of indigenous people is the use of workers from Oaxaca state by the agribusiness of Baja California, which has attracted considerable media attention, initially because racial stereotyping underpinned abysmal living and working conditions and flagrant violations of Mexico's labour protection laws, but more recently because these Mixtec workers have mounted strikes and protests.<sup>1</sup> There is, however, a vast amount of movement that remains invisible to the public, and to human rights activists, elsewhere along the Pacific Coast, as I discovered when I was working in the area between Lázaro Cárdenas city, on the border between Michoacán and Guerrero, and the agribusiness zone that stretches from the northern border of Michoacán through Colima to the port of Manzanillo. Here we even see migrants from Oaxaca replacing local indigenous workers as the latter have found new livelihoods as international migrants or in some of the most inaccessible communities, sowing marijuana or opium poppies. This tells us something about the continuing impacts of sustained rural crisis and uneven development, but if we go to Mexico's own southern frontier, we find ample evidence that, from the point of view of indigenous people, Mexico is often to Central Americans what the U.S. is to Mexicans: a step up in a larger regional race to the bottom for labour, which is fraught with very real personal hazards. Working illegally in Mexico not only involves dealing with the immigration authorities but also with the *maras*, the gangs that now operate throughout Central America and prey upon vulnerable migrants as they try to get a foothold across the border.

The *maras* are another face of transnationalism. These gangs were born in Los Angeles, not El Salvador, Honduras, Nicaragua, or Guatemala. They are the legacy of regional problems of intervention, displacement, and social polarisation in which the U.S. also plays a central role.

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1 Martínez Novo 2004.

That brings me back to the fundamental issue of migration across Mexico's northern border and its effects. Both seasonal and more permanent migrations to the U.S. have a long history which I cannot recapitulate here. But the point I need to stress is that indigenous people are being incorporated into this human exodus today on a far greater scale than in the past, and at a moment at which U.S. policies are making it increasingly difficult for poorer people who make it alive across the border to return home again. Some indigenous communities in Mexico do have long traditions of international migration: this would include the P'urhépecha zone of Michoacán, the state which has now returned to first place in the international migration league table in a way that affects the lives of all social classes and ethnic groups very profoundly. But international migration even from Chiapas has increased dramatically in recent decades and, with *narcocorridos*<sup>2</sup> blaring out of every radio, is increasingly becoming the dream of many young people even in some of the communities where there is still strong support for the Zapatistas. In fact, one of the unintended effects of NGO intervention in Chiapas has been to foster the idea that escaping the country could be the best route to further social mobility on the part of some community activists, but relatively austere lives in economic terms clearly always encourage some people to "vote with their feet" and experiment with some kind of migration.

Nevertheless, international migration is not necessarily about disappearing over the horizon and does not even necessarily imply cutting ties even when people stay away for long periods of time. Although there are still more stay-at-homes than migrants in a state such as Oaxaca, international *transmigration* has had social, cultural, and political impacts on Oaxaca that are disproportionate to its scale. Many of the Mixtecs who found work in Baja went on to try their luck across the border.<sup>3</sup> Today anthropologists habitually refer to a new transnational region termed Oaxacalifornia as the space within which Mixtec culture, society, and politics evolves, a space that not only includes the Mixtec communities located in California and Oaxaca, but large colonies in Northern Mexican cities such as Tijuana.<sup>4</sup> The point is that this space remains socially and politically connected. Those who remain in Oaxaca struggle to keep the migrants active members of their

2 *Narcocorridos* are the latest incarnation, usually backed by an accordion-based polka rhythm, of a long-established mestizo song genre, the *corrido*. *Corridos* have always celebrated the lives of bandits and illegal immigrants as well as the struggle with life and love of poor people in general, but their extension to drug traffickers by northern Mexican bands such as the Sinaloan group *Los Tigres del Norte* have made them controversial for mainstream media and hugely popular with ordinary people throughout the country.

3 Kearney 1986.

4 Besserer 2002.

communities by insisting that they continue to participate in sponsoring fiestas and holding community offices or face loss of their rights of "membership." Sometimes the migrants themselves take the initiative in fostering projects for community ecological rehabilitation, public works, and local political battles: some of these are against local community bosses or *caciques*, others to strengthen the community's independence against non-indigenous neighbours and powerful regional economic and political actors.

Oaxaca itself is a tremendously fragmented place, both because of its ethnic diversity and because its municipalities are very small.<sup>5</sup> In contrast to many other regions in which indigenous people live, the boundaries of the municipality and local indigenous community often coincide, whereas elsewhere a variety of indigenous communities that are sometimes in conflict with each other over land boundaries or timber exploitation are subordinated to municipal centres controlled by mestizos. This has made it easier to implement a specific style of indigenous autonomy legislation at state level in Oaxaca, the *usos y costumbres* system in which election of political representatives can optionally be done either by conventional secret ballot or through the consensus obtained in a communal assembly. In some Oaxacan communities, candidates are not allowed to run as members of national political parties, and Oaxacans are not alone in arguing that political party competition disrupts community life by promoting factionalism and subordinating community interests to outside agendas. The potential pitfall of this approach is that it may simply disguise the way that groups within the community may remain closely tied to particular political parties and more importantly, the way their leaders maintain links with wider networks of power and influence that will affect the way they discharge their responsibilities and the kinds of policies they advocate and implement. The other limitation of the Oaxacan indigenous laws is that they do not address indigenous demands that concern control over resources and the social rights that are so central to addressing the problems of poverty and marginalisation which diminish the lives of so many of Mexico's indigenous citizens.

## WHY INDIGENOUS RIGHTS MATTER

That brings me to one final point of qualification before I say more about Chiapas and then try to assess the significance of indigenous social movements in Mexico as a whole. On aggregate, Mexico's rural

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<sup>5</sup> Stephen 1997.



indigenous citizens remain its most disadvantaged citizens, not only in economic terms and in terms of access to public services, but in terms of civil and human rights. Indigenous people are less likely to receive due process of law than anyone else in a country in which judicial reform remains a priority even for citizens living more comfortable lives. Despite the efforts of domestic and foreign NGO workers and peace campers, the counter-insurgency campaign in Chiapas revealed the structural racism still endemic to much of Mexican society, and not only in the routine humiliation of indigenous men through the symbolic feminisation to which they were routinely subject by the Mexican army.<sup>6</sup> False criminal charges have often been laid against Zapatista sympathisers unable to defend themselves effectively due to language barriers. But at least Chiapas has seen efforts to improve this situation, not only through the work of the human rights NGOs, but also through the training of bilingual indigenous defenders able to navigate the labyrinth of the official justice system and press for more acceptable standards of evidence and due process.

Things remain very different in the region in which I last did fieldwork in Mexico, the coastal sierras of Michoacán state, inhabited by Náhuatl-speakers who have, unusually, managed to defend control of much of the communal land they were guaranteed by the colonial state through to the present despite some vigorous attempts to dispossess them at the end of the 19<sup>th</sup> and beginning of the 20<sup>th</sup> century. Currently plagued by the drug wars relating to control of the cocaine and heroin trades between the Sinaloa and Gulf cartels, this kind of region has no human rights observers nor NGO presence to offer protection from abuse by the military or judicial police that so often affects indigenous communities caught up in problems in which they play no part whatsoever. One of the problems that indigenous people often face is that the so-called “war against drugs” becomes a pretext for interventions that serve more political ends, as has frequently been the case in Chiapas and Guerrero as well as many regions of Michoacán, but beyond that there remains an embedded problem of institutional racism and mundane, everyday discrimination that must be recognised as one of the principal justifications of the whole indigenous rights movement.

This is not to say, however, that all indigenous people in Mexico are poor, marginalised and victimised. Some indigenous communities are quite prosperous and many indigenous communities are socially differentiated. There have always been indigenous elites of some kind, and the political and economic power of those elites has often been a major cause of local conflict historically. Indigenous communities have

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6 Stephen 2000.

displayed considerable political activism in the past, even if they were often defeated, and some have become quite aggressive in recent years. Chiapas is often portrayed, misleadingly, as a place that missed out on the revolutionary land reform. Yet the land reform of the 1930s under President Cárdenas was the foundation of the political bossism for which some of the communities of Highland Chiapas became famous in the later 20<sup>th</sup> century, and the *fincas* or landed estates in the Tojolabal zone in the south of Chiapas had already all but disappeared by the time of the EZLN rebellion in 1994.<sup>7</sup> Throughout the state, the 1960s and 1970s saw an increasing assertiveness on the part of indigenous communities. This led to a whole range of new experiments in indigenous politics and organisation and also provoked the exit of mestizo families that had been living inside indigenous settlements. These processes were paralleled in many other parts of the country; so let me now try to explain why.

### HOW INDIGENOUS MEXICANS BECAME AN “ETHNIC MINORITY”

Indigenous people constitute just over 12% of Mexico’s population. Despite the impacts of migration and urbanisation on their contemporary patterns of settlement, they remain geographically concentrated in states towards the south of the country. This means that elsewhere, indigenous people are a tiny minority: for example, they are only 3.2% of the total population in Michoacán despite the fact that the state has a militant indigenous rights movement. Because of Mexico’s size, it still has the largest national indigenous population in Latin America, more than 13 million, but the question I want to pose with these figures is what they really tell us.

Let us assume that what makes people “indigenous” today is that they claim to belong to one of Mexico’s indigenous ethnic groups, i.e. that is the way they define themselves. This is not, of course, a totally valid assumption, since there are several ways in which the state is the arbiter of claims to indigenous identity, especially in matters of rights to communal land and various kinds of targeted social development programs. But it opens up the fundamental historical question. In 1600, most of the inhabitants of Mexican territory saw themselves and were seen by others as indigenous *naturales*. After the chaos of the early decades following the Conquest, the Spanish Crown had set about “protecting” them in order to have tribute-payers and a colonial labour force, once the initial demographic catastrophe induced by European

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7 Van der Haar 2004.

diseases had passed. Enslavement of indigenous people was prohibited and the Crown abolished the *encomienda* system that had also contributed to the decimation of the native population of some regions because the Spaniards to whom the natives were “entrusted” grossly over-exploited them. This protection was achieved by creating judicially recognised “indigenous communities” with communal lands and a degree of autonomy in managing their own internal affairs. These colonial units of administration and exploitation became the principal point of reference for indigenous identities. People identified with their local community rather than more extensive ethnic groups.

But Mexico is geographically complex and each of its regions has its own history, which colonial systems of exploitation complicated even more as export markets came and went. Populations were moved and resettled by the Spanish, sometimes with catastrophic demographic consequences in the longer term. Indigenous people themselves sometimes abandoned their communities and migrated spontaneously, in search of a better life elsewhere, often in places previously only lightly occupied by mobile bands of hunter-gatherers who were displaced by the incomers. All that, coupled with the fact that most of the immigrants to New Spain were men, produced *mestizos*, people who abandoned an identity rooted in membership of an indigenous community. Becoming mestizo was principally a *cultural* process: anyone who spoke Spanish and dressed appropriately could cast off the status of *natural* and its tribute obligations once they left an official indigenous community.

Given that, we have to understand why people decided to retain indigenous identities and why they might have chosen to abandon them. The answers to that question are again a matter of particular local contexts, opportunities and costs, but one answer was that there was often a lot to be said for staying put, defending what had been saved from the Conquest, particularly land and resources, and living a life that allowed a certain autonomy in political and religious life at the community level, although this does not mean that indigenous communities were paradises of socio-economic equality or free from coercive and sometimes rigidly hierarchic forms of authority that some of their members, especially women, might find oppressive and stifling at times. What they offered was a kind of security and defence, but as historian Juan Pedro Viqueira is showing in his path-breaking demographic studies of Chiapas, both internal conflicts and the subordination of indigenous communities to non-indigenous landlords, including the monastic orders, could lead some families to opt for migratory strategies that fed the process of *mestizaje*.<sup>8</sup> We cannot

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8 Viqueira 2002.

assume that people who opted to abandon indigenous identities did so because they lacked the moral fibre to “resist colonial domination,” which is how the survival of the indigenous community is sometimes painted. Nevertheless, as the colonial era drew on, indigenous communities did have quite a lot to resist if they wanted to survive, in particular attempts by neighbouring landed estates or growing non-indigenous communities to dispossess them of their lands and water. Again, the threats to the indigenous community varied immensely by region and micro-region, but national independence eventually brought a general challenge, as liberal reformers set about dismantling the legacy of the colonial order and embarked on the privatisation of communal lands. Some communities rose up in arms, rather more tried in vain to use the law to defend their rights, but by the end of the 19<sup>th</sup> century Mexico had become a largely mestizo country because most of the former communities had been dispossessed of their arable lands, waters, and forests, and the bulk of their inhabitants were turned into rural proletarians. This is the process that has generated the present geographical distribution of indigenous communities, and it was not reversed significantly by the Revolution and subsequent land reform.

Although some former indigenous communities recovered their lands or received grants of new lands, the post-revolutionary state did not want to conserve indigenous cultures and identities but to forge a new mestizo nation by promoting cultural assimilation. The liberal reform had abolished the legal personality of indigenous communities and even when the Agrarian Codes were finally modified, from 1940 onwards, to allow for the official recognition of communal land rights again, members of the surviving indigenous communities held their rights to a share of communal lands and the right to speak as community members in assemblies as individuals whose names were entered on the rolls held by the state land reform ministries. Under these conditions, even more communities slowly abandoned their sense of indigenous identity.

But some communities hung in there tenaciously throughout this history and others reconstituted themselves, even on the basis of the state’s new land reform regime. This is true, for example, of the Tojolabal communities of Chiapas, which are entirely a product of the land reform in the sense that the entire population had worked as landless peones on the *fincas* beforehand. The Tojolabales adapted the new state model of communal assemblies to their own purposes, running their internal affairs in an idiosyncratic manner by official standards because official standards were not rigorously enforced.<sup>9</sup> This

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9 Van der Haar 2004.



is something that indigenous people had been doing since the arrival of the Spanish: institutions that were based on European models and imposed on native peoples, such as the religious confraternities, were appropriated and “indigenized” in ways that made them new forms with new purposes.<sup>10</sup> The Tojolabal case is also instructive in another way. Despite the fact that the population had been totally enclosed by the *fincas*, or more accurately perhaps *because* of that fact, there were region-wide links between Tojolabal groups, mediated by pilgrimages and other aspects of ceremonial life.<sup>11</sup> Unsurprisingly, then, the Tojolabales were the first to try an experiment in regional autonomous government, a decade before the Zapatista rebellion. Where local community organisation had been stronger historically, as in the Central Highlands of Chiapas, community boundaries tended to be stronger too, and identities were at their most localised.

What we can infer from this is that distinctive cultural practices are central to the reproduction of indigenous identities, but subject to two important qualifications. Firstly, indigenous culture has evolved and changed historically, through a process of interaction with European culture that is best described as a two-way process of transculturation.<sup>12</sup> So although cultural politics often gravitates around a defence of “tradition” and customs of supposedly great antiquity, in reality, many of these traditions are quite modern. That point certainly extends to some of the institutions that are central to debates about *usos y costumbres* in community government, even if consensual modes of reaching decisions are long established in a more abstract sense. It also extends to institutions that anthropologists working in regions of Chiapas have traditionally painted as diagnostic of indigenous community organisation, in particular the *fiesta-cargo* systems in which individuals ascend a hierarchy of ranked offices by sponsoring increasingly expensive types of ceremonial activity.<sup>13</sup> It is now clear that these replaced collective confraternity systems as a result of economic changes brought about by liberal reforms and the growth of migrant labour systems linked to the development of capitalist agro-export systems under conditions of growing pressure on remaining village landholdings. Secondly, the defence of culture and the right to be “different” today, as in the past, is about defending and if possible improving one’s place in society under conditions of accelerating social and economic change. That means that indigenous cultural politics involve increasing internal debate, including debate over religion, since Pentecostal churches are

10 Gruzinski 1990.

11 Mattiace 2003.

12 Gledhill 2004.

13 Viqueira 2002.

growing fast in some regions. But we need to understand these debates from the inside. For example, women in indigenous communities are less likely to accept exclusion from public decision-making but may adopt postures that seem odd to Northern feminists. One “tradition” many women are anxious to end is their husbands having affairs and neglecting their families, which can lead them to demand stern forms of moral regulation that young unmarried people in turn find oppressive, especially when they are surrounded by young foreign NGO workers or tourists who seem to be having a lot more fun. So what counts as “good culture” to be preserved is constantly being challenged, but we can see that the rise of indigenous rights politics has already produced some important shifts. For example, where once people encouraged their children to speak Spanish and abandon their native tongue because this seemed the best way to escape being stigmatised as an ignorant *natural*, there is now a growing emphasis on preserving and modernising *la lengua*.

## THE DEVELOPMENT OF INDIGENOUS MOVEMENTS

Where do modern indigenous rights politics in Mexico come from? Part of the answer is clearly global and transnational, as I suggested at the beginning. But there is also a Mexican dimension, an unintended consequence of the assimilationist policies of the post-revolutionary state. That state trained bilingual schoolteachers to help foster its policies of “Mexicanizing the Indian” by fostering use of Spanish, encouraging hygiene, and inculcating other dimensions of “modernisation” in skills and attitudes. But this created a new kind of community elite that often violently displaced traditional authority figures in regions such as Chiapas.<sup>14</sup> At first the teachers were state-loyalists and aligned with the ruling Institutional Revolutionary Party (PRI), and it is important to see that much of the history of indigenous activism in Mexico has been one of working through official institutional channels. But where the ambitions of these newly empowered indigenous political leaders were blocked by the domination of the regional scene by mestizos, they not surprisingly began to try to change this situation. Where they could not achieve this through militancy in the PRI and other official organisations, they turned to alternative organisations. Defections and conflicts accelerated in Chiapas through the 1980s because leaders who remained with the PRI had often converted themselves into local bosses who used their connections with

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<sup>14</sup> Nash 2001.

the government not only to line their own pockets but to acquire a stranglehold over the remaining profitable sectors of a local economy under stress as the plantation system declined, agricultural crisis deepened, and no new sources of employment emerged.<sup>15</sup> The Chiapas elite proved too inflexible to bring these developments under control by making selective concessions to rival indigenous organisations and leaderships.

But although this set the stage for an irruption of indigenous mobilisation, the EZLN rebellion of 1994 was the product of very specific micro-regional conditions.<sup>16</sup> The epi-centre of the rebellion in the Selva Lacandona was a region of peasant colonisation, which mixed people from different ethnic groups and communities together and these were mostly people who had previously been landless workers on *fincas*. They did not come to the Selva bringing with them the cultural baggage of fiesta-cargo systems and rather closed political organisation of the Central Highlands, but created their own institutions by once again appropriating forms of peasant organisation that the national government had, ironically, designed to *reduce* peasant mobilisation. By democratising the official model of the union of *ejidos* or agrarian communities, the people who became the base of the EZLN created a region-wide organisation that was drawn into a collision course with the state for a variety of reasons. These included a lack of lands for the next generation following the government's creation of a vast bioreserve designed principally to foster external exploitation of the region's resources, and a combination of exclusion from some of the state's social programs with inclusion in some development programs that were peculiarly unsuited to the area's social and ecological characteristics, in particular extensive cattle breeding schemes which left large numbers of people in irretrievable debt after the neoliberal reforms of the second half of the 1980s and early 1990s.

There were two external influences in the development of the EZLN. One was the role of the Catholic dioceses under Bishop Ruiz, with its orientation to Liberation Theology and Indigenous empowerment: a new generation of indigenous catechists became a new generation of radical peasant leaders. The other is subcomandante Marcos and his group of urban guerrillas. But I think we should believe Marcos when he says that it was the indigenous movement that changed the outlooks of the outsiders and not the other way around.

15 Rus and Collier 2003.

16 Leyva and Ascencio 1996.

## THE EZLN: AN ATYPICAL MODEL RESHAPES THE NATIONAL (AND GLOBAL) AGENDA

To conclude, I want to discuss what the EZLN has and has not achieved over the past twelve years. One thing it has clearly achieved is a central symbolic place in the international anti-globalisation movement and the affection and active support of large numbers of foreign activists and NGOs. Very few of those supporters understand the complexities of Chiapas or know a great deal about the many other indigenous and peasant organisations that have played roles in its recent political history. But the external support has not only allowed the Zapatista movement to survive repression, it has supplied the resources that have underpinned its experiments in autonomous development. The EZLN has been able to decide which NGOs will operate in its territory and preserve a reasonable degree of control over the inner heartland of the rebellion. It has, however, lost much of what it gained after 1994. Even within the Selva itself many communities that initially supported the rebellion have either left the movement entirely or divided into rival factions, usually divided between the EZLN and groups identifying with the PRI or the centre-left Party of the Democratic Revolution (PRD). This situation reflects the way that the government has persuaded many families to take the benefits offered by its social development programs despite the EZLN's instructions to its supporters to reject all relations with "bad government." It also reflects the EZLN's consistent refusal to countenance an alliance with the PRD, which it continues to depict as another manifestation of a corrupt political system.

In these respects, the EZLN does seem to be locked in an impasse in Chiapas, and it is perhaps an impasse that characterises much of the rest of the indigenous movement. What kind of sustainable livelihoods can be created in the fragile ecological environment of the Selva, and are these kinds of livelihoods likely to be attractive to people who also have options of migration? Does it make a great deal of sense to build the utopia of indigenous autonomy on rural territories within a context of the slow decay of maize farming and a Mexican rural economy which continues to be fettered by its subordination within the global food system dominated by transnational corporations and reinforced by U.S. trade policies? But there are other perspectives. While the overall economy of Chiapas may be stagnating and even de-industrialising,<sup>17</sup> the zone contested by the Zapatistas is of enormous interest to a variety of transnational corporate interests: the Selva itself has oil and minerals, biodiversity and eco-tourist assets, and

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17 Villafuerte 2001.



the southern frontier has become a site of potentially significant developments in the greenhouse cultivation of transgenic tomatoes and other kinds of high value produce, industries already supported by commercial forestry projects designed to produce wood for packaging. The new commercial agricultural investments have masses of cheap female labour to draw upon, and that is also potentially an asset that could be extended to new kinds of assembly and manufacturing production. The major problem is that there is still cheaper labour available south of the border.

In other words, the EZLN, like many other indigenous movements, is involved in a struggle over the shape and terms of development in Chiapas. Are we going to have an extractive economy, possibly combined with a sweatshop economy, that will suck profits out of the country, or is the population going to share more fully in the wealth generated in the region? From this perspective, the demand for territorial autonomy as control over resources that the Mexican government has never wished to concede takes on a quite different meaning: if extractive activities are to be allowed, can they be managed in an environmentally acceptable way and will the profits generated be shared by indigenous communities? What kinds of choices will people be allowed over their own futures?

This is an aspect of the EZLN program that resonates with many other indigenous movements that do not share other aspects of their philosophy, and it is also echoed in efforts to defend "patrimony" against forms of development that threaten to totally transform local social life. We know from experience that indigenous people north of the Rio Grande may think hosting casinos or nuclear waste dumps is an acceptable way of improving local living standards and creating jobs, but indigenous autonomy is about rights to manage as well as profit from "development," and indigenous communities in Mexico have now accumulated a lot of bitter experience of what "development" may do from, for example, the repeated failure of PEMEX to prevent devastating ecological harm. The economic and social stakes in indigenous autonomy demands are therefore substantial.

But what of the political stakes? The EZLN's international profile also reflects its model for grassroots direct democracy and implementation of the principle of "governing by obeying" (*mandar obedeciendo*).<sup>18</sup> Its most recent innovation, the "Good Government Councils," is an attempt to break the mould of local government in Mexico: the *Juntas de Buen Gobierno* are made up of representatives not only from local communities but also from different autonomous

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18 Harvey 1998.

municipal governments, who are rotated in office very frequently to avoid corruption and the pursuit of personal ambitions. This extension of the principles of direct democracy to create a higher level of regional administration threatens to undermine the traditional bases of political control from above and traditions of boss rule. It offers access to “good government” that listens to what local people say to everyone who lives in a region, indigenous or not, pro-Zapatista or not. In embarking, on the 12<sup>th</sup> anniversary of the uprising in January 2006, on another national tour christened “The Other Campaign,” subcomandante Marcos was striving to advance his organisation’s longstanding critique of the established political party system by inviting a new national debate on what democracy could mean in Mexico.

There are perhaps two ways to look at *La Otra Campaña* and the Sixth Lacandón Declaration on which it is based, the foundations for activities that have continued beyond the 2006 Presidential election campaign. One is that it is a new attempt to bring the indigenous movements into alliance with other kinds of social movements and forge a new national Left, something that the EZLN has tried in the past but failed to bring off for a variety of reasons, including the difficulties that urban working class Mexicans face in identifying with indigenous people from Chiapas. As Matthew Gutmann (2002) has pointed out, the fact that people who see themselves as “different,” see their problems as “different,” and advocate different strategies for solving them, does not mean that they cannot have debates about politics and social justice that slowly transform attitudes and in subtle ways might reshape Mexican political culture. In a sense, the utterly pluralistic, “let us respect difference,” posture of *La Otra Campaña* clearly seeks to tap the rich vein of what Gutmann calls the “compliant defiance” that permeates much grassroots sentiment in Mexico. Marcos is listening to people who have different kinds of grievances, but all connected in some way with the existing political system and the impacts of neoliberal capitalism. This, however, brings me to a second perspective, because *La Otra Campaña* is very specifically framed around the idea of building a new Left capable of waging a more effective anti-capitalist struggle. For Marcos the PRD is an enemy not simply because it embodies the systemic corruption of the political system but because it is a neoliberalised social democratic party incapable of confronting global capitalism in any meaningful way. Indigenous rights and autonomy have not disappeared from this discourse, but do seem to be downplayed. So perhaps this new move is the recognition of another impasse, an attempt to break out of the movement’s imprisonment both within the terms of the indigenous rights debate and within a comparatively small region of Chiapas.

Advance on the indigenous autonomy front is now bogged down in what generally seem vain efforts to get better legislation from state governments than the indigenous movement obtained from the federal Congress in 2001. The social and economic destiny of Zapatista territory is controlled by far larger national forces and cannot be changed significantly simply by sustaining a local semi-subsistence economy which younger people are very likely to abandon by voting with their feet. The wider political impact of *La Otra Campaña* remains to be seen. It continues the EZLN's longstanding insistence that no one is seeking power or political office and it remains a kind of utopian experiment aimed at seeing what can be built by recreating a dialogue between different kinds of dissident movements and voices in Mexico. But this may be exactly what indigenous politics itself needs if it is to move forward.

One of the problems with indigenous rights politics, as its critics point out, is that it asks that different kinds of citizens have different legally recognised rights. It is not clear that this is fair, particularly if possessing an indigenous identity gives a poor person advantages that an equally poor mestizo cannot claim. This is, in fact, another way of thinking about why indigenous identity politics have flourished in a neoliberal world: by playing on transnational sympathies, post-colonial guilt and romantic images of "ethnic others," indigenous people may be able to negotiate concessions from the state that other poor citizens cannot obtain, and tap into the special funding available from the multilateral agencies, which extend from targeted social development funds to money assigned to purchase lands to create communal territories. Fairness is certainly an issue, and it should be said that where indigenous groups have gained a legal edge in conflicts with non-indigenous neighbours recently, the results have not always been attractive: however understandable in terms of past histories of discrimination, the eviction of some comparatively poor mestizo peasants from their lands has not always seemed the best way of correcting past mistakes. Today's mestizo peasant victims were often manipulated by more powerful regional actors in the past: the latter now tend to be long gone and enjoying upper class lifestyles in urban centres.

There is also the danger, again stressed by Juan Pedro Viqueira in the Chiapas context, of creating what are in effect "reservations" in which indigenous people will continue to be exploited as low-cost producers and cheap labour by the social classes that control the commanding heights of the larger economy, thereby reproducing what is, in effect, a colonial structure of exploitation now dominated by transnational corporations and their Mexican business associates. Another problem is the emphasis on *usos y costumbres*. As examples

of the vices that might be perpetuated as a result of letting “communities” do things in their own way, critics often point to the continuing exclusion of women from some community assemblies and indigenous forms of justice that do not respect the rules of evidence, involve inhuman and degrading forms of punishment, or involve unreasonable sanctions against property and persons because the accused and their families are expelled in the interests of “harmony.” Appeals to “traditions” that do not stand up to historical scrutiny are sometimes used to disqualify political opponents for threatening community moral integrity, and to bolster the position of dominant factions that are not governing in a way that protects the interests of minorities, such as members of non-Catholic religious groups.<sup>19</sup> Other critics point to the way that indigenous identity politics sometimes bolsters ethnic essentialisms that can even divide the indigenous rights movement itself, let alone prevent broader alliances to confront common problems in contemporary rural or urban life. It is quite common, in Oaxaca and elsewhere, for one community to adopt the racialised language of dominant non-indigenous groups to assert its difference and superiority over neighbours of another ethnicity. I found tendencies towards this kind of fragmentation between neighbouring Nahua communities in Michoacán, since they emphasised differences of origin and “race.”<sup>20</sup>

Yet I suggest that whatever else might be questionable in the EZLN strategy, it is none of the above. The EZLN does not exclude mestizos or foster ethnic essentialism: how could it, since it is a movement founded on ethnic mixing and the creation of a new regional peasant culture? In this respect, it belongs to a family of Mexican rural movements, such as the *Unión de Comuneros “Emiliano Zapata”* in Michoacán, founded by the self-taught agrarian lawyer Efrén Capiz who sadly died last year, which have tried to deconstruct the official model of a mestizo nation that deprecates living Indians by encouraging mestizos to remember their own historical ties to indigenous Mexico.<sup>21</sup> The EZLN sometimes uses the language of *usos y costumbres*, but it has been at the forefront of efforts to transform the position of women in indigenous communities, and urged its supporters to recognise the values enshrined in global human rights discourses – in both cases often at the cost of friction amongst its base. Although it found itself trapped into the logic of trying to build an autonomous economy in a limited regional space, its aim is clearly not to create reservations but to

19 Santín del Río 2005.

20 Gledhill 2004.

21 See also Stephen 1997.



transform the entire economic system by combining with other movements and social sectors. This may remain a utopia but it is necessary to ask what the alternatives might be. At the moment they might be: dying of chemical poisoning working in a plastic tent growing transgenic tomatoes; working for an infra-subsistence wage in a local plant that enables Wal-Mart to supply goods at prices even the worst paid U.S. workers can afford; or trying to avoid being shot by the border patrol or dying of dehydration in the desert so as to become one of the super-vulnerable undocumented workers that Haliburton's subsidiary, Kellogg, Brown and Root, decides not to pay for their contribution to the clean-up and eventual ethnic cleansing through redevelopment of New Orleans. Against that potential race to the bottom, indigenous movements seem to have a lot going for them.

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# Social Movements and the Questioning, Shaping, and Challenging of Mexican Democracy

John Stolle-McAllister

The wide diversity of social movements in terms of demands, styles, and organisations make it difficult to coherently or fairly generalise about them. This diversity can be seen, for instance, in the ways that the Zapatistas have tried to forge broad alliances across different interest groups and multiple identities. Addressing an audience in Mexico City's Zócalo in 2001, subcomandante Marcos, after a trademark joke, begins: "Brother, sister: Indigenous person, worker, campesino, teacher, student, colono, housewife, driver, fisher, taxi driver, dockworker, office worker, employee, street vendor, gang member, unemployed, media worker, professional, religious, homosexual, lesbian, transsexual, artist, intellectual, activist, sailor, soldier, sportsperson, legislator, bureaucrat, man, woman, child, teenager, elderly." It is this wide array of potential constituencies that the now renamed Delegate Zero is addressing and listening to in "La Otra." But it is the movements that are drawn from this confusing and often contradictory gamut of civil and political society and the ways in which they try to define themselves, advocate for their positions, and contribute to the shaping of public life that that I want to address here.

With the caveat that these social movements are not reducible to any single model of analysis, I want to discuss a general theme of a kind of disconnect between what grassroots activists and political establishment figures express when they discuss their visions of the common good, of democracy, and of fairness. Many of the the important structural changes that have taken place in formal politics do not seem to hold much capital for many participants in social

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1 La Otra Campaña is an effort by the Zapatistas to forge a national left political alliance. It is "the other" in contrast to the traditional political campaigns in 2006. The Zapatistas' declared intention was to travel to every state in the country and listen to the needs, hopes, and strategies of the country's poor and disenfranchised majority.

movements emerging during and since the 1990s. Although many activists have pushed for greater institutional transparency and greater representation, there exists a palpable tension between “social” activists and “political” institutions, with the former quite sceptical and distrustful of the latter. Again, it is this large, heterogeneous, and marginalised group to whom the Zapatistas are directing “La Otra.” I will analyse two important, although in many ways very localised movements, one occurring before the 2000 transition in government and one after in order to argue that despite some very important differences between the movements, at heart there is fundamentally a cultural struggle intertwined with economic demands. Although in both cases there were certainly immediate and pressing issues (after all, those are usually the only ones that we stand up and fight for). Interwoven with those political and economic grievances were questions about identity, values, and the meanings of collectively held symbols and institutions. These struggles tie together local ideas and practices with those originating from and circulating through the national and global circuits of meaning that constitute public life.

### TEPOZTLÁN AND ATENCO

Between 1995 and 1996, activists in Tepoztlán, Morelos, organised the population to oppose the construction of a golf course and country club. As a result of the struggle, Tepoztecos expelled governmental authorities and elected their own officials according to the logic of already existing internal organisations. After the crisis waned they continued, within the limitations of federal electoral law, to use those renovated traditions as mechanisms of formal political selection. Similarly, in 2001 and 2002 residents of Atenco, Mexico, drew upon their local identities and connections to their land to wage a successful campaign to stop the construction of Mexico City’s new international airport on their *ejido* lands, claiming that their ancestral rights trumped the federal government’s right to expropriate them. Even after the government cancelled the airport, activists in Atenco challenged the democratic credentials of the new administration by blocking elections in March and July 2003 to protest ongoing legal action against them and to decry what they characterised as an electoral farce of a fundamentally antidemocratic system.

Within this context of an unsettled and unclear transition, locally based social movements give voice to those other versions of democracy that explicitly include meaningful and direct participation in decision making and local control over cultural and natural resources.

Their demands represent the fragmentation of Mexican society and serve as important outlets for the contentious political and cultural discourse that parties and state institutions are unwilling or unable to accommodate. Although they by no means represent an impending threat to the current system, their flourishing deepens and complicates national discussions about the design and implementation of democracy by challenging the limits of reform that political parties attempt to impose. They refuse to respect the limits of the political subjectivity that elites are attempting to create through the transition process, opting instead to articulate the demands that locality and specificity play important roles in national discussions.

In Tepoztlán, the movement was organised originally by a small group of community activists calling themselves the Committee for Tepozteco Unity (CUT). The group drew upon much previous activist experience, the heterogeneous class backgrounds of members, and their integration within influential networks both in the nearby state capital of Cuernavaca and Mexico City. Beginning in 1994, the CUT researched the proposal by the Kladt-Sobrino Group (KS) to build a \$500 million USD luxury golf course and country club on communal, private, and state owned lands within the municipality.<sup>2</sup> Despite approval from government inspectors, CUT members were convinced of neither the ecological nor the social sustainability of the project. Over the course of several months, CUT activists gradually convinced fellow Tepoztecos to oppose it, arguing that the project would cause considerable damage to the community. In August 1995, despite public and written promises to the contrary, the Municipal President and *Ayuntamiento* (Town Council) approved the needed permits for KS to begin construction. Within hours of this news, the CUT organised a rally in which 8,000 of the municipality's 24,000 residents took over the Municipal Offices, and exiled their elected officials.

After a month in which the state governor and project supporter, Jorge Carrillo, refused to answer numerous requests to officially dissolve the municipal government and hold new elections, the Popular Assembly, which met nightly and was open to all residents, ordered the CUT to organise elections for a provisional council and president. Since many residents feared that the political parties would try to manipulate the conflict for their own advantage, they banned them

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2 In addition to communal land, to which KS hoped to gain title, it intended to use "private" land that it had acquired from a corporate predecessor. Legal ownership of this land was much disputed. Former small landholders charged that they were tricked or coerced into selling in the 1960s and some of the land was actually communal land that had been improperly "sold" years earlier. The town sued KS over the ownership issue, and in 2001 the courts finally agreed and returned the titles to the Communal Authorities.

from participating. Instead, candidates were selected from neighbourhood assemblies convoked by the *mayordomo*<sup>3</sup> from each of the municipality's barrios. On election day, the seven highest polling candidates were named to the *Ayuntamiento Libre, Popular, y Constitucional* (Free, Popular, and Constitutional Council), and sworn into office a week later in a ceremony symbolically presided over by *Tepoztecatl*, the community's founding figure, a god-man in regional mythology.

The conflict dragged on for several months and the town was effectively isolated both by the barricades it had erected at all of its entrances as well as by the refusal of the state to recognise its new government. The state government effectively isolated the municipal government by withholding its funds (municipal governments' funds come almost exclusively from state treasuries) and refusing to recognise vital documents, such as birth, marriage, and death certificates, issued by the *Ayuntamiento libre*, making life in a bureaucratised society difficult. State officials further attempted to pressure the movement by imprisoning several of its leaders on falsified murder charges and threatening to arrest many others. In April 1996, state police ambushed a convoy of Tepoztecos on its way to present a letter of protest to President Ernesto Zedillo. One elderly activist, Marcos Olmeda, was shot to death and dozens of others were seriously injured. As word leaked out of this attack, KS found itself having to cancel the project and the state government began making conciliatory appeals to the Tepoztecos. The stalemate, however, continued through 1997 when regular elections could be held. After much internal debate, the Tepoztecos arrived at an agreement under which they participated in the elections using the centre-left Party of the Democratic Revolution's (PRD) registry and chose candidates through the neighbourhood assemblies as they had done in 1995.<sup>4</sup>

In Atenco, the conflict began when the federal government announced in October 2001 that it was expropriating the *ejidos* in and around the municipality in order to build a new international airport to serve Mexico City's ever growing communication and transportation needs.<sup>5</sup> Without consulting the *ejidatarios*, the federal government announced that it would pay landowners 7 pesos (70 cents U.S.) per

3 Mayordomos are neighbourhood leaders selected in an open assembly every year. They are charged with overseeing the neighbourhood's chapel, organizing the annual celebration, and are seen as spiritual leaders.

4 See Rosas 1997; Quero 2003; and Stolle-McAllister 2005a, for a more detailed account of the Tepoztlán movement.

5 Ejidos are communally held lands established in the land reform in the wake of the Mexican Revolution (1910-1920). Until 1992 these lands were inalienable from their holders, who could only transfer ownership through inheritance.



square metre of land. Seasoned activists organised themselves quickly into the Front of Pueblos in Defence of the Land (FPDT) and immediately began a series of direct actions to stop what they characterised as the theft of their land. Like in Tepoztlán, local officials who had collaborated with the expropriation order were expelled as traitors and the Popular Assembly took responsibility for governing. Confrontations with state and federal officials escalated over the next several months as the FPDT repeatedly blocked highways and held marches in the capital to win support for their cause. In July 2002, state police attacked an FPDT march, injuring several and capturing most of the movement's leadership. One man, Enrique Espinoza, later died at least in part from the injuries he received from state police. In order to free their comrades, Atenco protesters marched to the regional city of Texcoco, seized the assistant Attorney General and some of his staff, blocked the main highway, and threatened to blow up two hijacked gasoline tanker trucks. They also armed themselves with a large cache of Molotov cocktails and other simple weapons to fend off any potential police assault. After several days of a tense standoff, the arrested Atenquenses were released on bail and the government officials freed. The commitment of the expropriated *ejiditarios* and the negative publicity surrounding the violence forced the Fox administration to cancel the project.

As in Tepoztlán, however, the cancellation of the immediate project did not end the conflict because movement leaders continued to push other demands, particularly recognition of their autonomy and the dropping of legal proceedings against them. This stance resulted in an increasingly bitter dispute within Atenco as some residents wanted to end the movement and others advocated deeper reforms. The FPDT successfully boycotted and disrupted elections in March and July 2003 in order to have charges against their leaders dismissed and to show their displeasure with what they saw as the shallowness of Mexican democracy. By December 2003, however, the FPDT negotiated a deal to allow elections and some of their members agreed to serve as local *ayundantes* to represent their neighbourhoods.<sup>6</sup>

## CULTURAL HYBRIDITY AND THE CONTINGENCIES OF CONTEXT

JSM: So, how do you communicate with each other?

FPDT activist: It is quite beautiful and practical. We use our traditions. If we have a meeting that we want everyone to attend, we ring the church bell

6 See Lajous 2003; Russell 2003; and Stolle-McAllister 2005b; for a more detailed account of the Atenco movement.

several times throughout the day. If it is an emergency we shoot off rockets, just like we do at fiestas and as we have always done. Well, that and cell phones, of course.

One of the interesting aspects of these movements is the ways in which participants navigated and combined different cultural discourses. Like all cultures, theirs are thoroughly hybrid, that is, a mixture of different strands of thought, values, and practices.<sup>7</sup> One can see this hybridity in the juxtaposition of symbols and practices from different times and places common in everyday life. It is not unusual, for instance, to see someone with a cell phone and someone carrying a machete and wearing huaraches pass each other on the street. In the case of social movements what is particularly important in this regard is that movement activists are openly questioning the symbols and institutions that help to define their lives, therefore making some of those subterranean connections and meanings more open to display and contention. In the case of social movements, we can also observe that the cultural hybridity taking place is not just the random collision of different cultures, but the ways in which those cultural tools and meanings are combined is very much dependent on the context of the struggle and the particular leadership and convincing talents and insights of individual movement participants.<sup>8</sup> Although the divide is somewhat artificial, for explanatory purposes I will look at how the movements arose from and transformed local, national, and global cultural discourses.

Both movements built their organisations on local networks of communication and articulated a sense of difference from other communities and from the nation as a whole. López Austin (2001) argues that despite the constant reinvention demanded by an ever-changing world, many of the *pueblos* of central and southern Mexico maintain, at their core, a Mesoamerican worldview defined by specific relationships to their territory and reproduced through rituals and practices stressing community history and mutual obligation. This core is neither homogenous to all Mesoamerican communities nor does it dictate any particular action. Indeed, the range of responses to demands for political and economic integration throughout the region would suggest that this common cultural heritage does not prescribe a particular answer. Rather it forms a common history and understanding that, with the right combination of circumstances and leadership, may serve as *one* of the means through which communities defend themselves against what they perceive to be outside encroachment on

7 García Canclini 1995.

8 Stolle-McAllister 2005a.

their resources and their identities. Although, or perhaps because, this cultural core was threatened by these projects, movement activists were able to use it to orient many participants in their decision to take direct action against the companies and government agencies working toward building them. Furthermore, participation in the movements helped reinforce the importance of this cultural core by affirming community members' mutual dependence on one another and by adding another chapter to long-running narratives concerning justified rebellion and local autonomy. The movements created new stories about, and identities of, themselves by splicing together and recycling fragments of narrative and imagery concerning their indigenous heritage, their communities' place in the Mexican Revolution, and their social positions as (or legacies of having been) peasant-farmers within national discourses of identity.<sup>9</sup>

In Tepoztlán this sense of difference has been developed over the years in part through the cyclical reproduction of community and neighbourhood identities, as well as the town's important tourist trade, which in part, depends on a "rustic" image. The conflict, in many ways, was very much about locality, about protecting local interests in a particular territory. Given the power of their opponents, there was clearly a need to build internal cohesion among protest participants, a task made difficult by the town's long history of oftentimes bitter family, gender, partisan, and class divisions. The movement built internal solidarity by using pre-existing communicative and symbolic structures in the town constructed around neighbourhood religious observances and organisations, which allowed them to frame the conflict as an attack against Tepozteco sovereignty and dignity. By winning the support of neighbourhood and religious leaders, the CUT helped establish legitimacy for its protests, and by emphasising the unique identities, fortified by locally specific festivals and rituals, they helped deepen a sense of difference among community residents. The ability to clearly identify one's community as unique made it easier for activists to rally support for their cause and to oppose the state and federal governments.

When I asked one of the movement leaders, a middle-aged teacher and union activist, how they were able to achieve high levels of internal solidarity, he explained, "I have a very difficult town. We fight amongst ourselves all the time. But when we are threatened from outside, we put aside our differences and come together".<sup>10</sup> Indeed this would seem to have been the case, as polls at the time indicated upwards of 90% of the inhabitants of Tepoztlán supported the movement, while

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9 Stolle-McAllister, forthcoming.

10 Interview, Tepoztlán, 1999.

supporters of the golf course quickly found themselves isolated and at times threatened for their views. "Traitor" was one of the more cordial epithets used to describe CUT opponents. This sense of internal solidarity built on a discourse of authenticity, where legitimacy was conferred on residents by their family's standing in the community and by their participation in communal activities. Since most Tepoztecos opposed the golf course, support of it demonstrated inauthenticity and delegitimised the supporter's standing within the community.

Many residents claim to have territorial ties dating back to pre-Conquest times and see the current neighbourhood system as an outgrowth of ancient *calpulli* organisations. Each neighbourhood holds an annual celebration to honour its patron saint. At the end of the festival, which is unique to each neighbourhood but includes music, food, Mass, fireworks, and visits from friends and relatives, an assembly is held and after much public discussion, a *mayordomo* is elected by a show of hands to oversee the needs of the chapel and organise next year's festival.<sup>11</sup> This annual leadership selection, and the ritual cycle surrounding it, serves to reinforce a sense among Tepoztecos that despite their undeniable integration into larger regional, national, and global systems, they still maintain a distinction within those wider sets of relationships.

In a similar way, activists in Atenco sought out and used local networks and identities to build up their struggle and consolidate internal solidarity. Although a general awareness of an indigenous legacy was not as obvious in Atenco, in fact many residents claimed to be coming to that awareness as a result of their struggle, the community found a common identity in their collective ownership of their *ejido* lands. Because of the *ejido*, they had long-standing relationships with each other and a history of working together toward a common goal. Similarly they also, despite important internal cleavages, maintained a sense of community identity. The day of San Salvador in Atenco brings people together to celebrate their patron saint and their community. Even at the height of bitterness and division that followed the 2003 electoral disputes in Atenco, residents on all sides of the debate agreed that the annual festival "brings everyone together. At least for a little while, we put aside our differences. Politics does not matter then."<sup>12</sup> Another resident summed up the feeling of mutual responsibility, noting:

I joined the movement to defend my *pueblo*. We are like a family here. [...] You do what you have to in order to protect it. If you were the head of a

11 Echeverría 1994.

12 Interview, Atenco resident, July 2003.



family, and you didn't have anything to feed them, you would go into debt with the milkman, you would go into debt with the baker, you would go into debt with the butcher. You would do what you had to. It is the same thing here with the movement.<sup>13</sup>

The key issue in both movements, however, was the communities' connection to their land as both an economic and an ideological framework for their arguments. In Tepoztlán much of the land was legally communal and selling the land to a private interest went against common understandings of the ways that people should have access to it. People identify very clearly with the mountains that surround them, both in terms of personal experience, family history, and local mythology.

In Atenco, most of the families living in the municipality were in one way or another connected with the *ejido*, and even if they did not all earn their livings from the land, agricultural work produced at least a supplemental income for many, and because the *ejido* is inalienable, families have worked and profited from the land since the end of the Revolution. Many residents viewed the expropriation as unfair not only because they were offered an insultingly low price for their parcels of land but because those lands were also their homes. One resident explained that he had decided to join the movement after understanding the potentially devastating effects that the expropriation would have on his own family.

I was never involved with politics and, to tell you the truth, had not thought much about the airport. But one night I came home from work and found my mother crying that this would be the last crop that my father harvested. He has worked the land all of his life. What was he supposed to do now? It just wasn't fair to take all of that away from him.<sup>14</sup>

Many of the Atenco activists pointed out that the land represented not only their current livelihoods but also their futures and their children's futures.

The money would only last for a little while. And then what would we do? We may always be poor farmers, but at least we and our children will always be able to feed ourselves if we have our land. That is something that many of us have taken for granted, and having it threatened has made us more aware of that.<sup>15</sup>

By arguing that they have inherited their lands from their grandparents and are keeping them for their children, they stress both

13 Interview, Atenco, July 2003.

14 Interview, FPDT activist, Atenco, July 2003.

15 Interview, FPDT activist, Atenco, July 2003.

their historic connection to their territory and what they see as their best hope for a livable future. As James Russell points out, in the current economic situation of the country where the price of food has greatly outpaced the production of jobs and the rise in salaries (which have actually declined in relation to purchasing power), "it would be irrational for peasants willingly to give up or sell the land from which they derive a basic subsistence. Even apart from their cultural attachment to it and considering only economic interests, the often meagre subsistence that they derive from the land is far better than what they could hope for in the paid labour market."<sup>16</sup> The meaning of the land, therefore, was an important component of local identity and defeating these projects became intimately tied with defending the rights of the community to define its own identities.

The movements, however, were not limited to just these local concerns. Since everyone's life is composed of elements circulating from numerous sources, activists also engaged these discourses and practices in putting together their movements. At an organisational level, both movements quickly put together coalitions of like-minded allies to support them. These organisations were present in rallies held in the towns as well as in Mexico City and reflected broader political and social issues. The anti-golf course and "free" Tepoztlán movements became a focal point for anti-PRI organising. The abuses of authority that activists suffered as well as the neoliberal trampling of local desires were used as evidence of the need for profound political reform. The very space of the town was used by regional and national groups. The Zapatistas, for instance, sent letters of support in 1995 and 1996, and Zapatista activists and leaders stayed in the town during national tours in 1999 and 2001. Similarly, activists in Atenco found kindred spirits in national organisations criticising the transition process as superficial. Leaders of the UNAM Student General Strike Committee offered their assistance and solidarity and were an obvious presence throughout the conflict.<sup>17</sup> One of the *huelgistas*, for instance claimed, "what they are doing here is incredible. This is what we should all be doing. They have never backed down. Never compromised. They have remained truer to their beliefs than the Zapatistas."<sup>18</sup> As they were fighting to keep their *ejidos*, therefore, the FPDТ activists were also engaged with other national discussions about the depth, or lack thereof, of democracy in

16 Russell 2003:23.

17 The FPDТ was harshly criticized by its opponents for being manipulated by the (very radical) student committee. One FPDТ leader confided in me, however, "with all due respect to the kids on the committee, they say that they were manipulating us, but, really we showed them a few things about how to organize."

18 Interview, Atenco, July 2003.

Mexico, arguing that as long as economic inequality was so prevalent and the political parties were organised only for their own advancement, that real democracy could not exist. One FPDТ supporter explained, "The parties come around at election time and promise us anything and everything. Then we never hear from them again. No, we're not stupid. We know they can't deliver. How can they represent us? They don't know us and we don't know them? What kind of democracy is that?"<sup>19</sup>

At a more symbolic level, activists in both movements were also using and transforming national meanings of the Revolution. The image of Zapata, for instance, accompanied marchers and figured prominently in movement spaces. In Tepoztlán, because Zapata is from the area and used Tepoztlán as a staging ground for military actions, he holds a particularly important place in the hearts and worldviews of many residents. Zapata has been mythologised by the state and social groups have contested his meaning for the past century. He represents, of course, that part of the Mexican Revolution that could not be bought off, that never surrendered. He was the voice of the most marginalised segments of Mexican society, and his mission was never complete. By linking their struggles to Zapata, therefore, the movements were not only trying to resignify his symbolic importance, but they were appropriating the myth-building of the very state that they were opposing. Furthermore, this link with Zapata connected the movements to a latent campesino ideology, also encouraged by the state through much of the populist era, which posited the values of authenticity and seriousness with peasant farmers. Unlike politicians and intellectuals, campesinos understand the true importance of events, work hard and do not get involved lightly in faddish political movements. Again, by linking their movements to these ideals, activists were signifying their rebellions as the fulfilment of those unfinished revolutionary and just goals of "true" Mexico.

Finally, of course, these movements were engaged with the wider world as well. Activists were very clear about their understanding of how neoliberal capitalism exploited them, and they saw these projects as yet another example of powerful corporations and their government agencies taking away their resources. One Atenco resident explained, "The biggest problem is capitalism. They try to fool us with elections, but they won't change anything as long as it is the capitalists who decide everything. The parties and the elections only serve capitalism, and that's what is making us poor."<sup>20</sup> One of the objections that the FPDТ raised to the expropriation of their lands was that although the airport

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19 Interview, Atenco, July 2003.

20 Interview, Atenco, July 2003.

was technically public property, private companies were going to benefit from the construction and running the airport and auxiliary services. In Tepoztlán, residents feared not only losing access to their lands once the private company put up walls around its enclave, but also losing access to its water, which is already inadequate in the dry season, as several environmental impact statements suggested that the golf course would use over half the town's water supply.

Outside of identifying their opponents as part of the global economic system, activists in both movements also realised that they needed to find allies in the transnational world as well. Using contacts that activists had in the press, the movements very carefully projected their image and their message through the mass media. Regularly scheduled press conferences and access to movement leaders were parts of comprehensive media strategies. Both movements reached out to potential allies using contemporary technologies and generated support in the form of press coverage, demonstrations, and letter writing campaigns in the United States, Canada, and Europe. Adopting transnational strategies to national spaces, however, was more than just holding press conferences and putting up websites. They also incorporated transnational activist discourses, such as environmentalism and human rights, into the framing of their arguments. Framing land disputes as arguments about preserving ecological balance not only made their situation more easily understood by people far away, but it also contributed to internal rethinking about the uses of natural resources. One Atenco resident told me that he had never thought much about the land, but "the struggle has made us not take it for granted. We are going to learn how to take better care of it, so it is here for our children."<sup>21</sup> Police attacks were framed in terms of human rights violations, as was the taking of their lands. When the police attacked Tepozteco citizens in April 1996 it was the human rights community that immediately brought pressure on KS to drop the project. In Atenco, the FPDT framed their right to the land using such transnational institutions as the International Labour Organization (ILO), which has specific language protecting indigenous people's lands from expropriation by national states.

Culturally then, the movements emerged in very dynamic situations in which people were balancing, questioning, and blending very different and sometimes contradictory worldviews and practices. Because the movements were challenging the status quo of at least part of the overall project of dominant society, they were also engaged in a process of fighting over the meanings of publicly held symbols and

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21 Interview, Atenco, July 2003.



practices. In some ways, the movements served as catalysts allowing these populations, within the limitations of their specific contexts, to work with, modify, blend, and create cultural discourses and social practices that made sense to them, helped them to understand the world, and provided a means through which they could attempt to shape their realities.

## CONTESTING DEMOCRACY

How do these movements, then, contest and shape democracy in Mexico today? At one level, they obviously challenge political authorities and force them to take into account local concerns when enacting policies. The movements also directly questioned the model of democracy being promoted by political elites. To begin with, there was widespread scepticism over the viability of national political institutions. CUT leader and two-time PRD Municipal President of Tepoztlán, Lázaro Rodríguez, criticised the national party, asserting, "Democracy can only work locally, because none of the parties has the vision or ability to make structural changes at the national level."<sup>22</sup> Likewise, FPDT activists refused to work with the political parties, believing that the politicians affiliated with political parties were more interested in advancing their own careers than in actually representing and working for the community. Instead, both communities opted to enact a type of direct democracy. At the height of conflict, they turned to the historic tradition of the Popular Assembly, which has its roots in communal land holdings and *ejido* governance. The Popular Assembly publicly debated issues and decided courses of action. One participant in Atenco explained, "Their politics takes place inside, behind doors. Here if someone has an idea, they say it from the stage, and people talk about it, argue about, and decide whether or not it is a good idea."<sup>23</sup> Both movements also found the limits to direct democracy, as attendance at assemblies and interest in the time consuming process dropped as the crises waned. Nevertheless, they were attempting to enact a different kind of democracy, one that placed more importance in local decision making than in national or state level bodies. Sovereignty, for them, lay in the local community and not the federal state.

At perhaps a more abstract level, the cultural struggles of these movements also suggest an attempt to redefine democratic directions in Mexico. Borrowing from Zapatista calls for autonomy, the state that

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<sup>22</sup> Interview, Tepoztlán, 21 July 2001.

<sup>23</sup> Interview, Atenco, July 2003.

these movements seem to suggest is one in which local identities and communities should form the basis of larger social relations. Part of that would require not only community control over natural resources, but also a profound respect for cultural difference. One Atenco activist explained:

Autonomy is not complete independence; no one wants that. But it is the right to decide internal matters according to your own ways. No one can come into your house and tell you you have to do this or that. No. The same thing here. If we don't want an airport or we don't want elections or the parties, why should we have to put up with them?<sup>24</sup>

This call is for a very radical rethinking of what democracy ought to be. The state, for the moment, has sought to assimilate other perspectives and to provide more transparent mechanisms for transferring power than have previously existed. But these types of movements and the types of audiences that the Zapatistas are currently trying to organise demand a much more profound democratisation that truly accounts for a dynamic and pluricultural population.

24 Interview, Atenco, July 2003.

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# Mexican Machos and Hombres

Matthew C. Gutmann

"Haven't you also lost something  
for following your father?"

Rodolfo Usigli<sup>1</sup>

"Are any of you married?" I asked the *muchachos*.

"No, *todos solteritos*, all young and single," said Felipe.

"That bozo's got two little squirts. He's the *macho mexicano*," said Rodrigo, pointing to Celso, the father of two children who lived with their mother in another city.

"What does that mean?" I inquired.

"Macho? That you've got kids all over," said Esteban.

"That your ideology is very closed," said Pancho. "The ideology of the *macho mexicano* is very closed. He doesn't think about what might happen later, but mainly focuses on the present, on satisfaction, on pleasure, on desire. But now that's disappearing a little."

"You're not machos?" I asked.

"No, *somos hombres*, we're men."<sup>2</sup>

My discussions with these young men, the *muchachos*, took place in May 1993 in the working class neighbourhood of Santo Domingo, on the south side of Mexico City, where I was living and conducting ethnographic fieldwork on changing male identities.<sup>3</sup> Similar to other

1 Usigli 1947:25

2 The word *hombre* may have special resonance for aficionados of Hollywood Westerns. Expressions like "He's a tough hombre" are regularly used to conjure up images of Mexican bandits for whom life means little, and sexual conquest is but part of daily life. Historically there is more than a coincidental relationship between Mexican male identities and cowboys.

3 Fieldwork was conducted 1992-93, with grants from Fulbright-Hays DDRA, Wenner-Gren, National Science Foundation, Institute for Intercultural Studies, UC MEXUS, and the Center for Latin American Studies and Department of Anthropology at UC Berkeley, and 1993-95, under a grant from the National Institute of Mental Health. My gratitude to the Centro de Estudios Sociológicos and the Programa Interdisciplinario de Estudios de la Mujer, both at El Colegio de México, and to the Departamento de Antropología, Universidad Autónoma Metropolitana-Iztapalapa, for providing institutional support during fieldwork in Mexico City. Portions of this

poor areas of the Mexican capital, men and women of all ages in Colonia Santo Domingo have experienced dramatic transformations in recent years in terms of what it means to be men and women, including with regard to parenting, participation in political movements, paid work, education, sexuality, and more. At the same time, because the *colonia* was founded by land invasion and has been largely self-built, and because women have played a prominent role in this history, residents of Santo Domingo have also been challenging gender relations inherited from the past even more than in many other parts of Mexico.

With so many men working outside Santo Domingo during the day, from its inception much of the daytime responsibility to construct and defend the *colonia* fell largely upon women. They were the ones in charge of communications during the early days in the 1970s, when private and police-connected goons swept through the community trying to extort or evict less than vigilant squatters. With wooden poles, clods of dirt, rocks, and shovels the women had to physically guard their new properties and those of neighbours. Such exploits on the part of many women became emblematic of the invasion, not simply because of the courage and determination they evinced, but because women throughout the area were coming to be widely regarded as key decision-makers and leaders.

This paper takes as its point of departure Michelle Rosaldo's insight that, with regard to the study of women, "What is needed ... is not so much data as questions."<sup>4</sup> Certainly the most conscientious of data-gathering ethnographers, Rosaldo nonetheless was never satisfied with merely expanding anthropology's storehouse of empirical knowledge. In a similar fashion, in the study of masculinities, while we have much to learn about men as *men*, it is even truer that we need new ways of studying and interpreting and not simply more raw information. Most specifically, I wish to apply Michelle Rosaldo's emphasis on the need for new approaches to feminist theory and method to an examination of how men in Mexico have recently been characterised by different anthropologists and other scholars.

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paper were presented at the 1994 Latin American Studies Association Congress; the University of California at Davis; and a 1994 colloquium on Oscar Lewis in Mexico City. My thanks to those who offered commentaries and to those who read earlier drafts of this paper, especially Stanley Brandes, Teresita de Barbieri, Mary Goldsmith, M. Patricia Fernández Kelly, Michael Herzfeld, Gwen Kirkpatrick, Louise Lamphere, Margarita Melville, Eduardo Nivón, Ben Orlove, Nancy Scheper-Hughes, and Carol Smith. I have also greatly benefited from discussions on machismo with Carlos Monsiváis and Roger Lancaster. Portions of this essay are excerpted with permission from "The Meanings of Macho" by Matthew Gutmann, 2006 ©The Regents of the University of California. Published by the University of California Press.

4 Rosaldo 1980:390

Why, for example, have so many writers seemed intent on discovering a ubiquitous, virulent, and "typically Mexican" machismo among men in that country? In this paper I trace the roots of such stereotyping in part to earlier national character studies in anthropology, as well as to the imposition by the media and by other social scientists in the United States of totalising cultural histories, including with respect to gender, on countries like Mexico.

In many respects Rosaldo anticipated the critical feminist analysis represented by what Nancy Fraser calls the "shift from 'differences among women' to 'multiple intersecting differences.'"<sup>5</sup> It was precisely such differences that Michelle Rosaldo saw as elemental to the creative activities of men and women to develop new social formations and relations.<sup>6</sup> Only by employing a critical feminist analysis and exploring multiple intersecting differences can we adequately record and understand emerging and diverging gender politics in societies such as Mexico's today. For example, although it is common to hear women and men in Colonia Santo Domingo say that while there used to be a lot of macho men, many will add that they are not as prevalent today. Some older men like to divide the world of males into machos and *mandilones* (meaning female-dominated men), where the term macho connotes a man who is responsible in providing financially and otherwise for his family. For older men, to be macho more often means to be *un hombre de honor*, an honourable man.<sup>7</sup>

It is far more common for younger married men in Colonia Santo Domingo to define themselves as belonging to a third category, the "non-macho" group. "*Ni macho, ni mandilón*, neither macho nor *mandilón*," is how many men describe themselves.<sup>8</sup> Others may define a friend as "your typical *macho mexicano*," but the same man will often reject the label, describing all the things he does to help his wife around the home, or pointing out that he does not beat his wife (one of the few generally agreed on attributes of machos). What is most significant is not simply how the terms macho, machismo, and machista are variously defined — there is little consensus on their meanings — but more, that today the terms are so widely regarded by working class men in Colonia Santo Domingo, Mexico City, as pejorative and not worthy of emulation. The same could be noted with regard to the semantic

5 Fraser 1997:180.

6 Rosaldo 1980:416.

7 Behar (1993:40) cites an incident several decades ago involving a woman who denounced her husband in front of municipal authorities in a village in San Luis Potosí using these words, "The fact is that he's no man. He's no man because he's not responsible for his family. He never treats his family well. He treats them worse than animals!"

8 Mandilón comes from mandil (apron) and translates literally as "apron-er."

opposite of *el macho mexicano*, that is, *la mujer abnegada*, the self-sacrificing woman. These twin, reified images of gender identity are frequently and explicitly contrasted in popular discourses in and about Mexico.

For both material and ideological reasons, *los hombres*, men, and *los machos* are indeed valid anthropological categories in Mexico today. Often, though not always, these terms are popularly conceived of in contradistinction to *las mujeres*, women, and *las mujeres abnegadas*. Yet in line with Behar's call to "go beyond first world representations of third world women as passive, subservient, and lacking in creativity,"<sup>9</sup> we should recognise that there is always both acquiescence and dissension with regard to these concepts, and that no category is popularly regarded — or should be seen — as homogenous. Nor is the following discussion based on a structuralist binary opposition, in this case that of man/woman or *macho/abnegada*. "Manliness" and "womanliness" are not original, natural, or embalmed states of being; they are gender categories whose precise meanings constantly shift, transform into each other, and ultimately make themselves into whole new entities.

For younger men like the *muchachos*, then, the present period is largely distinguished by its liminal character with respect to male gender identities: as neither-macho-nor-*mandilón* these men are precisely betwixt and between marked cultural positions. This is a clear illustration that like other cultural identities, notions of masculinity and femininity must be historically understood in relation to other divergent cultural trajectories such as those involving class, ethnicity, and generation.

## ANTHROPOLOGISTS AND THE CREATION OF MEXICAN MACHISMO

Because of his crispness, scope, and vigour in presentation, Oscar Lewis is a central anthropological ancestor for the contemporary study of Mexican machismo.<sup>10</sup> Though he contradicts himself on occasion, his descriptions in *The Children of Sánchez* (1961) and other books are still a constant point of reference for all contemporary students of the changes and continuities of life between and among women and men in Mexico. His theoretical formulations are also still delightfully provoking, if unfortunately too often insufficiently developed, including with regard to the concept of machismo.

In trying to understand Mexican men, however, some scholars have utilised details from Oscar Lewis' ethnographic studies to promote

9 Behar 1993:272.

10 See Lewis 1951, 1959, and 1961.



sensationalist generalities that go far beyond anything Lewis himself wrote. For instance, in David Gilmore's widely read survey of the Ubiquitous (if not Universal) Male in the world, machismo is discussed as an extreme form of manly images and codes.<sup>11</sup> Modern urban Mexican men are useful to Gilmore mainly as exaggerated archetypes; with other Latin men they constitute the negative pole on a continuum — from machismo to androgyny — of male cultural identities around the world. Mexican machos are thus employed as a foil against which other men less concerned with virility are compared. Gilmore cites Lewis to make his ethnographic points about Mexican men:

In urban Latin America, for example, as described by Oscar Lewis,<sup>12</sup> a man must prove his manhood every day by standing up to challenges and insults, even though he goes to his death "smiling." As well as being tough and brave, ready to defend his family's honour at the drop of a hat, the urban Mexican ... must also perform adequately in sex and father many children.<sup>13</sup>

To be sure, such a characterisation of "the urban Mexican [male]" does find echoes in popular culture, for instance in the line from the hit song of 1948, "Traigo mi .45" ("I'm carrying my .45"), "*¿Quién dijo miedo, muchachos, si para morir nacimos?* Who's talking scared, boys, if we were born to die?"<sup>14</sup> But even if Lewis's ethnographic descriptions, compiled in the 1950s, were just as valid decades later, Lewis did not usually generalise in this fashion about the lives of Jesús Sánchez and his children. His anthropology was often artfully composed and some of his theories were naïve, but Lewis generally tried to keep "mere" romance and fancy out of his ethnographic descriptions.<sup>15</sup>

Before proceeding further, three general points bear mentioning here. First, macho (in its modern sense) and machismo (in any sense) have remarkably short word histories. Indeed tracing the historical permutations and modulations of these words is critical to understanding the ongoing discrepancies that exist popularly and in the social sciences regarding their meanings. Carlos Monsiváis in particular has linked the emergence of the ethos of machismo especially to the Golden Age of Mexican Cinema in the 1940s and 1950s.<sup>16</sup>

11 Gilmore 1990.

12 Lewis 1961:38.

13 Gilmore 1990:16.

14 See Monsiváis 1981:108.

15 Though Lewis did include machismo on his list of over sixty possible traits illustrative of the "culture of poverty" (see Rigdon 1988:114-15) he seemed ambivalent about the efficacy of using the term, inserting and deleting it in his publications (see Gutmann 1994).

16 See Monsiváis 1981, 1992.

Second, machismo as discussed here is not reducible to a coherent set of sexist ideas. It is not simply male chauvinism. As Roger Lancaster stresses in his astute and pioneering study of Nicaragua, "machismo is resilient because it constitutes not simply a form of 'consciousness,' not 'ideology' in the classical understanding of the concept, but a field of productive relations."<sup>17</sup> Determining the systemic character of machismo is predicated on following the historical tracks of the term. As these lead in various directions in different times and circumstances in Mexico and Nicaragua, for instance, the structural and material content of machismo must be kept in mind.

Finally, I would point to another central, recurring focal point in many if not most meanings of machismo: bodily functions. These refer to beatings, sexual episodes, consumption of alcohol, defiance of death, and the not so simple problem of defining the categories of "men" and "women." Regardless of how confusing gender identities may seem, they usually share relations of mutual dependence with these somatic realms.

As to some of the characteristics frequently cited as manifesting machismo on the part of men — wife beating, alcoholism, infidelity, gambling, abandonment of children, and bullying behaviour in general — many men, and more than a few women, exhibit certain of these qualities and not others, at certain times and not others. There are historic, systemic, and bodily facets of machismo. Figuring out how exactly the pieces fit together is the problem.

## COWBOYS AND RACISM

In Mexican newspapers, academic literature, and dictionary entries, the terms macho and machismo have been used in contradictory ways. The definitions employed or implied in such official circles reveal not only a diversity of views regarding the substance of the terms, but also widely disparate conjectures as to the origins of the words and their meanings. Emphasising sexuality, in a frequently quoted paper on machismo, Stevens calls machismo "the cult of virility," adding that, "The chief characteristics of this cult are exaggerated aggressiveness and intransigence in male-to-male interpersonal relationships and arrogance and sexual aggression in male-to-female relationships."<sup>18</sup> Greenberg captures some of the ambivalence of machismo when he describes an episode in which Fortino, the protagonist of his study, "was being very

<sup>17</sup> Though machismo is not necessarily the same beast in every cultural context, as we will see. Lancaster 1992:19.

<sup>18</sup> Stevens 1973:90.

macho, in a non-confrontational, almost womanly manner."<sup>19</sup> Macho may thus be identified with non-aggressive ("womanly") behaviour.<sup>20</sup> Many anthropologists and psychologists writing about machismo utilise characterisations like manly, unmanly, and manliness without defining them. They seem to assume, incorrectly in my estimation, that all their readers share a common definition and understanding of such qualities.<sup>21</sup>

In a brilliant essay published in English in 1971, Américo Paredes provides several clues as to the word history of machismo, and in the process draws clear connections between the advent of machismo and nationalism, racism, and international relations. Paredes finds that prior to the 1930s and 1940s in Mexican folklore – a good indication today of popular speech at the time – the terms macho and machismo do not appear. The word macho existed, but almost as an obscenity, similar to later connotations of machismo. Other words, some also semantically related to men, were far more common at the time of the Mexican Revolution: *hombrismo*, *hombría*, *muy hombre*, *hombre de verdad* (all relating to *hombre*, man), and *valentía*, *muy valiente*, etc. (relating to valour, courage).<sup>22</sup> Despite the fact that during the Mexican Revolution the phrase *muy hombre* was used to describe courageous women as well as men, the special association of such a quality with men then and now indicates certain points in common regardless of whether the words macho and machismo were employed.

Making a connection between courage and men during times of war – in which men are the main, though assuredly not the only, combatants – is nevertheless not the same thing as noting the full-blown "machismo syndrome," as it is sometimes called. To oversimplify, if courage was valued during the Revolution this was true for both men and women, though the terms used to refer to courage carried a heavy male accent. Beginning especially in the 1940s, the male accent itself

19 Greenburg 1989:227.

20 For a psychological-anthropological analysis of machismo, see also Gilmore and Gilmore 1979.

The role of the press and popular writings in the United States have not been incidental in popularizing the terms macho and machismo, for instance in national character studies and their progeny. For the earliest published references in English to "macho," see Beals 1928:233 and Mailer 1959:19, 483-84.

21 Dictionaries are in conflict over the term, tracing the etymological roots of macho to Latin and Portuguese words for masculine and mule, and tracing the cultural ancestry of macho to Andalusian soldiers of the Conquest, or certain indigenous peoples of the Americas, or Yankee gringo invaders in the early part of this century. On the etymology of "macho," see Gómez de Silva 1988:427 and Moliner 1991:II:299-300. On diverse and contradictory aspects of the cultural history of "machismo," see Mendoza 1962; Santamaría 1959:677; and Hodges 1986:114.

22 Even though the classic novel of the Mexican Revolution, *Los de abajo* (first published in 1915) at one point uses the expression "machito" (translated as simply "a man" in Azuela 1962:79) this does not constitute the widespread use of the word macho or even familiarity with the term in the sense of machismo or any of its derivatives.

came to prominence as a national(ist) symbol. For better or worse, Mexico came to mean machismo and machismo to mean Mexico, providing an illustration of what Mary Louise Pratt shows to be the “androcentrism of the modern national imaginings” in Latin America.<sup>23</sup>

The consolidation of the nation-state and party machinery throughout the Mexican Republic and the development of the country’s modern national cultural identity took place on a grand scale during the presidencies of Lázaro Cárdenas and Manuel Avila Camacho (1934–1946). After the turbulent years of the Revolution and the 1920s, and following six years of national unification under the populist presidency of Lázaro Cárdenas, the national election campaign of 1940 opened an era of unparalleled industrial growth and demagogic rule in Mexico. Coincidentally, one of the campaign slogans of the ultimately successful presidential candidate Avila Camacho was: “Ca ... MACHO!” As Paredes points out, the president was not responsible for the use of the term macho, but “we must remember that names lend reality to things.”<sup>24</sup>

Searching for a national identity is a very modern project in Mexico as elsewhere. Often remembered for his blunt diagnosis of the country’s “inferiority complex,” Samuel Ramos is also frequently cited as the original critic of Mexican machismo.<sup>25</sup> Once again, however, Ramos never used the terms macho or machismo. Yet the connections between *lo mexicano* and manliness (however defined) were striking in Ramos. He centred his account of the nation’s inferiority on the “well-known Mexican type, the *pelado*,” whose conduct was one of “virile protest.”<sup>26</sup> The *pelado* is a male proletarian, vulgar and poorly educated, Ramos reports, who himself associates “his concept of virility with that of nationality, creating thereby the illusion that personal valour is the Mexican’s particular characteristic.”<sup>27</sup> The particular association by Ramos of negative male qualities with the urban working class has been a prominent theme in writings on “Latin American masculinity” and machismo ever since his study was published in 1934.

Notions of machismo in Mexico are connected by many scholars to discussions of social class. Stevens calls the popular acceptance of a stereotyped Latin American macho “ubiquitous in every social class,”<sup>28</sup> a summation which has led some scholars whose

23 Pratt 1990:50. See Bolton (1979) on machismo among Peruvian truckers for a recent study of these imaginings.

24 Paredes 1971:23.

25 See Ramos 1962.

26 Ramos 1962:9.

27 Ramos 1962:63.

28 Stevens 1973:94.



geographical interests lie outside the region to utilise the concept of machismo in their own studies and made machos and machismo standard terms in the social sciences for labelling a host of negative male characteristics in cultures around the world.<sup>29</sup> In contrast, Paredes links machismo especially to Mexico's middle classes, while Limón writing about working class Chicanos in south Texas effectively critiques the class prejudices of Ramos regarding machos *pelados*.<sup>30</sup>

The word history of machismo is but a piece of the larger puzzle regarding the outlooks and practices codified in tautological fashion as instances of machismo. For Paredes, the peculiar history of U.S.-Mexican relations has produced a marked antipathy on the part of Mexicans for their northern neighbours. The image of the frontier and the (Wild) West has in turn played a special role in this tempestuous relationship, with the annexation of two-fifths of the Mexican nation to the United States in 1848, and repeated U.S. economic and military incursions into Mexico since then, putting the lie to proclamations of respect for national sovereignty.

Trade between the two countries initially included the export of the Mexican *vaquero*-cowboy to the United States, Paredes reminds us. In the early 19<sup>th</sup> century, the frontiersmen of Texas and further west were forging the way for the expanding Jacksonian empire, and their combination of individualism and sacrifice for the higher national good came to embody the machismo ethos. Together with the pistol, the supreme macho symbol, such an ethos came to play a similar role in the consolidation of the Mexican nation, which is one reason why "*machismo* betrays a certain element of nostalgia; it is cultivated by those who feel they have been born too late."<sup>31</sup>

On the other side of the border, in the United States, I would argue that the term machismo has a rather explicitly racist history; from its first appearance in print in English<sup>32</sup> machismo has been associated with negative stereotypes of Mexicans, Mexican-Americans, and Latin American men.<sup>33</sup> Contemporary popular usage of the term machismo in the United States often serves to rank men according to their supposedly inherent national and racial characters, as in, "My boyfriend may not be perfect, but at least he's no Mexican macho." Such analysis

29 See, for example, on the former Yugoslavia, Simic 1969:100, 1983; modern Muslim society, Mernissi 1975:5; and Micronesia, Marshall 1979:90.

30 Limón 1994. A review of recent literature regarding machismo and Chicanos is outside the scope of this paper, but beyond Limón (1989, 1994) interested readers may profitably consult Baca Zinn 1982; Almaguer 1991; and Mirandé 1997.

31 Paredes 1971:37.

32 Griffith 1948:50.

33 Representative examples of popular stereotyping of Mexican and Latin American men in the United States media are Reston 1967 and McDowell 1984.

utilises non-sexist pretensions to make denigrating generalisations about fictitious Mexican male culture traits.

## JORGE NEGRETE AND *LO MEXICANO*

The consolidation of the Mexican nation, ideologically and materially, was fostered early on not only in the gun battles on the wild frontier, not only in the voting rituals of presidential politics, but also in the imagining and inventing of *lo mexicano*, *mexicanidad* in the national cinema. And of all the movie stars of this era, one stood out as “a macho among machos.” Ever the handsome and pistol-packing *charro*, singing cowboy, with his melodious and eminently male tenor, Jorge Negrete came to epitomise the swaggering Mexican nation, singing:

I am a Mexican, and this wild land is mine.  
On the word of a macho, there's no land lovelier  
and wilder of its kind.  
I am a Mexican, and of this I am proud.  
I was born scorning life and death,  
And while I have bragged, I have never been cowed.<sup>34</sup>

In the rural cantinas, the manly temples of the Golden Age of Mexican Cinema, the macho mood was forged. Mexico appeared on screen as a single entity, however internally incongruent, while within the nation the figures of Mexican Man and Mexican Woman loomed large. The former:

... untamed, generous, cruel, womanizing, romantic, obscene, at one with family and friends, subjugated and restless ... [the latter] obedient, seductive, resigned, obliging, devoted to her own and slave to her husband, to her lover, to her children, and to her essential failure.<sup>35</sup>

The distinctions between being a macho and being a man were starting to come into clearer focus in the Mexican cinema of the 1940s:

To be macho is now part of the scenery. To be macho is an attitude. There are gestures, movements. It is the belief that genital potency holds the key to the universe, all that. It goes from the notion of danger to the notion of bragging; that's the difference between macho and man [*hombre*]. As the song says, “If you've got to kill me tomorrow, why don't you get it over with

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34 *Yo soy mexicano, mi tierra es bravía.*

*Palabra de macho, que no hay otra tierra más linda  
y más brava que la tierra mía.*

*Yo soy mexicano, y orgullo lo tengo.*

*Nací despreciando la vida y la muerte,*

*Y si he hecho bravatas, también las sostengo.*

*From the song “Yo soy mexicano.”*

35 Monsiváis 1992:18.

now." That is being very manly [*ser muy hombre*]. "I have four wives."  
That is being very macho [*ser muy macho*]. (Carlos Monsiváis)<sup>36</sup>

Then, at the end of the 1940s, Mexican machismo underwent a most refined dissection by Octavio Paz. Despite Paz's wish to speak only to a small group, "made up of those who are conscious of themselves, for one reason or another, as Mexicans,"<sup>37</sup> this work more than any other has come to represent the official view of essential Mexican attributes, like machismo, loneliness, and mother worship. When Paz writes, "The Mexican is always remote, from the world and from other people. And also from himself,"<sup>38</sup> he should not be taken literally but *literarily*. It is a beautifully written book, and part of the reason for its elegance may be that Paz was creating as much as he was reflecting on qualities of *mexicanidad*. As he put it in his *Return to the Labyrinth of Solitude*, "The book is part of the attempt of literally marginal countries to regain consciousness: to become subjects again."<sup>39</sup>

Paz writes with regard to men and women in Mexico, "In a world made in man's image, woman is only a reflection of masculine will and desire."<sup>40</sup> In Mexico, "woman is always vulnerable. Her social situation — as a repository of honor, in the Spanish sense — and the misfortune of her 'open' anatomy expose her to all kinds of dangers."<sup>41</sup> Biology as destiny? But there is nothing inherently passive, or private, about vaginas in Mexico or anywhere else. Continuing with Paz, just as "the essential attribute of the *macho*" — or what the macho seeks to display anyway — is power, so too with "the Mexican people." Thus *mexicanidad*, Paz tells us, is concentrated in the macho forms of "caciques, feudal lords, hacienda owners, politicians, generals, captains of industry."<sup>42</sup>

Many Mexican men are curious about what it means to be a Mexican, and what it means to be a man. One is not born knowing these things; nor are they truly discovered. They are learned and relearned. For some, this involves the quest for one's patrimony. "Pedro Páramo is my father too," declares one of Mexico's bastard sons.<sup>43</sup> Even if he is an infamous brute, a father is a father. For the Mexican macho and for the nation, it is better to have one than to be fatherless.

36 Interview, 20 February 1993.

37 Paz 1961:11.

38 Paz 1961:29.

39 Paz 1985:330.

40 Paz 1961:35.

41 Paz 1961:38.

42 Paz 1961:82.

43 Rulfo 1959:3.

In Paz and much of the literature of cultural nationalism in Mexico in recent decades:

[...] the problem of national identity was thus presented primarily as a problem of *male* identity, and it was male authors who debated its defects and psychoanalyzed the nation. In national allegories, women became the territory over which the quest for (male) national identity passed...<sup>44</sup>

## MANDILONES AND DOMINATING WOMEN

In Colonia Santo Domingo, in addition to Paz, another authoritative source of information about machismo and national identity which people use in the stories they tell about themselves is Oscar Lewis. Or at least what people have heard about his anthropological writings — Lewis is “remembered” far more than he is read.

In the social sciences Lewis continues to be the most cited reference with regard to conclusions about Mexican masculinity. In fact, three particular sentences from his *Children of Sánchez* (1961) are employed with astonishing frequency in anthropological texts to represent all Mexican males past, present, and future:

In a fight I would never give up or say, “Enough,” even though the other was killing me. I would try to go to my death smiling. That is what we mean by being “macho,” by being manly.<sup>45</sup>

This specific passage is cited, for example, by Marshall in his discussion of machismo in Micronesia,<sup>46</sup> by Madsen and Madsen in a paper on alcohol consumption in Mexico,<sup>47</sup> and, as quoted above, by Gilmore in his comparative survey of the images of masculinity.<sup>48</sup> A few sentences on page thirty-eight of *Children of Sánchez* have thus come to shoulder an immense responsibility in anthropology: to provide a quotable sound bite defining Mexican masculinity/machismo.

Is this quotation really such a good and accurate concentration of Mexican male identity? If it were, as if by ethnographic decree, every male soul who finds himself south of the shallows of the Rio Grande and north of the highlands of Guatemala must at least try to go to his death smiling if he wishes to retain his Mexican male credentials. I doubt very much if Lewis’ intention was to summarise the life experiences and desires of all Mexican men in this short passage. Perhaps most revealing of all, the sentences in question are not even

44 Franco 1989:131.

45 Lewis 1961:38.

46 Marshall 1979:89.

47 Madsen and Madsen 1969:712.

48 Gilmore 1990:16.



Lewis' own, but are actually part of a monologue by Manuel Sánchez, one of the Sánchez children. Manuel is nonetheless the man whose ideologically-charged comments to Lewis on one particular day in the mid-1950s have frequently come to speak for all Mexican men since that time.<sup>49</sup> We anthropologists may well ask where this need to see pervasive machismo comes from, and why so many have used Lewis to prove their own preconceptions and prejudices.

In Colonia Santo Domingo in Mexico City there are significant differences in the uses and meanings of the terms macho and machismo. These reflect, and often concentrate, contrasting urban and rural experiences, generational differences, class stratification, stages within individuals' lives, and, in the age of television satellites, the impact on people throughout Mexico of what others around the world say about them and their national peculiarities.

Returning to the term *mandilón*, stronger than 'henpecked' but not nearly as vulgar as 'pussy-whipped' in English, we see by its common daily use that it is an expression produced by a machista system, and that it is at the same time a response to machismo.<sup>50</sup> Angela and I were walking through the *sobre ruedas* open-air markets one day in October 1992, shortly after we first met, and she remarked that maybe my wife Michelle should buy a *mandil*, an apron, "in Mateo's size," so I could be a proper *mandilón*. Angela added that her son Noé, whom I had not yet met, was a *mandilón*. I asked her why, and she responded by saying that Noé washed dishes, cooked, and took care of his daughter. I wanted to know how Noé had come to do these things. "*No lo crié para ser macho mexicano*; I didn't raise him to be a *macho mexicano*," came the answer. I wondered aloud if Noé would accept this appellation. Angela insisted that he would.

In early November, I asked Noé about being a *mandilón*. "*No soy mandilón*," corrected Noé, "I'm not a *mandilón*. It doesn't bother me at all to help my wife. I share everything with her." But Noé rejected the title of *mandilón*, which he defined as, "he who is dominated by women."

Noé's younger sister Norma came by our apartment in January because her husband Miguel had not come home, and I was the last person to have seen him. After a *fútbol* playoff Miguel and I had gone over to the coach's house for tacos, beans, and beer. I had left hours earlier, but by 8 p.m., Mie still had not returned, and Norma was worried. Yet she could not go looking for him herself, she said, because

49 Another U.S.-born writer, Ernest Hemingway, is perhaps more responsible for popularizing ideas about Latin heroics, also known as machismo, in the United States. See the discussion of defiance in the face of death on the part of Hemingway's characters in Capellán 1985.

50 Another way to refer to a man-as-mandilón, is, "El es muy dejado; He's very put upon."

that might make him look like a *mandilón* in front of the other young men: a wife coming to fetch her (presumably) drunk husband.

Not labelling a man a *mandilón* is not merely a matter of helping him save face, however, because for many women as well as men it carries negative connotations. That is, being a *mandilón* is seen as a positive opposite of macho to some like Angela, but to others it is but an inverse form of the macho's empty boasting. In both cases the definitions of *mandilón* reflect awareness of power differences between men and women, that is, a contradictory consciousness, to engage Gramsci's formulation, with respect to male identities.<sup>51</sup>

"I don't want a man who's either macho or *mandilón*," one young woman told me.

"Why not *mandilón*?" I asked.

"Because who wants someone who can't stick up for himself, who's used to getting bossed around and likes it that way." In other words, life is hard enough as it is, and a young woman can ill-afford depending on a *mandilón* for her husband. Instead, one needs a partner who can make things happen and not just wait for orders from others, his wife included.

Among men in their twenties and thirties in Colonia Santo Domingo, it was rare to hear anyone claim the title of macho for himself. "Why, I wash dishes and cook," some would protest when called macho by a friend. Machos do neither of these things, nor do they spend a lot of time with their children, many felt. Even more than these activities, however, the most common reason for *not* accepting the name of macho was, "I don't beat my wife." A grandfather of sixty-seven explained to me that he was no macho, and that his own father before him had not been either. "Why, he never drank a beer in front of the kids," my friend told me, "and he never beat his wife."

Today among the young in Mexico City the model of aggressive masculinity is no longer the pistol-packing *charro* cowboy of yore looking for a tranquil rancho where he can hang his sombrero. He has been replaced by the submachinegun-spraying Rambo launching assaults on the Vietnams or Afghanistans of the moment. No one would argue that Rambo is a product of Mexico, yet there and in his land of origin is he not known as the ultimate macho? Local symbols become globalised and then relocalised and reglobalised.

For some men today, "the macho" is also a playful role they can perform on demand. I stifled my displeasure one evening when, at her three year-old granddaughter's birthday party, and in her capacity of patron saint of my research project, Angela took me by the hand and

<sup>51</sup> Gramsci 1929-35:333.

introduced me to several men whom she said were "genuine representatives of Mexican machismo." After being so presented to one young man, Angela demanded of him, "Where's your wife?" A sly smile crossed the man's face, "I sent her to the bathroom." His wife was seven months pregnant, the man added, so like the good macho Angela accused him of being, he had to send her to the bathroom a lot. Often such jokes were followed by remarks that revealed an acute sensitivity to the cultural beliefs about Mexican men which many in Mexico think are held by North Americans. "That's really what you gringos believe about us, isn't it?" people would sometimes comment when I raised the image of Mexican men preferring to go their death smiling than lose face.

The ethnographic authority of anthropologists to expound on issues of supposed "national character traits" has a long history in Mexico and elsewhere, stemming back to World War II and the need at the time to place clear national labels on enemy and allied characters.<sup>52</sup> Not only is such a quest for national characteristics premised upon the notion that cultures are in some reasonable sense "whole" and sealed, but anthropology in particular has been instrumental in "discovering" common cultural beliefs and practices, thus linking nation-states to particular ideas and behaviours. Hence were born theories of cultural difference and national otherness. Of course, if this starting point of dividing the world into national others is found wanting — i.e., if with Michelle Rosaldo we insist on asking the right questions and not simply gathering more documentation for evident truths — then the whole framework of Mexican male attributes collapses in a heap of national(ist) essentialising.<sup>53</sup>

In the dramas that people in *colonias populares* offer about their own and others' marriages, the parts played by self-designated machos are not all playful by any means. "We cheat on our wives because we're men," said one acquaintance. "We want to be macho." What does this mean, "we want to be macho," except that "to be macho" is an ideological stance which can only be sanctified by others — men and women — and by oneself? In my discussion with the *muchachos*, while one of them said that they were not machos but rather they were *hombres*, men, Celso insisted that, as men, by definition they were machos. He said that if they needed to call

52 See Fabian 1983.

53 An illustration of the influence of the United States on macho self-perceptions among Mexicans was provided for me on 5 July 1993, when I participated in the Mexico City-based, nationally televised talk show, "María Victoria Llamas." I was invited to speak to the theme "A lo macho," and asked to make two points: (1) machismo is not just a problem in Mexico, and (2) based on my research it was clear that not all men in Mexico were machos. I was informed that this would sound especially convincing coming from a North American anthropologist.



themselves something, *mandilón* and *marica* (queer) were obviously inappropriate. So what else did this leave except macho?<sup>54</sup>

The description provided by Celso makes it appear that the youths rummage around in an identity grab-bag, pulling out whatever they happen to seize upon, as long as it is culturally distinct. One minute these *muchachos* identify themselves as machos who enjoy bragging about controlling women and morally and physically weaker men. The next minute the same young men express bitterness at being the ones on the bottom.

## REDEFINITIONS

Delineating cultural identities and defining cultural categories, one's own and those of others, is not simply the pastime of ethnographers. Despite the fact that creating typologies of Mexican masculinity can result in parodies without living referents, and overlooking for the moment the not unimportant issue of how men and women in Colonia Santo Domingo understand manliness and define what *ser hombre*, to be a man, means, there is purpose to the social science quest for better ways to categorise men in Mexico.

So while no one in Santo Domingo might explicitly divide the population of men this way, I think most would recognise the following four male gender groups: the macho, the *mandilón*, the neither-macho-nor-*mandilón*, and the broad category of men who have sex with other men. But the fact that few men or women do or would care to divide the male population in this manner reveals more than simply a lack of familiarity with the methods of Weberian ideal typologising. Masculinity, like other cultural identities, is not confined so neatly in box-like categories like macho or *mandilón*. Identities only make sense in relation to other identities, and they are never firmly established for individuals or groups. Further, consensus will rarely be found as to whether a particular man deserves a label such as neither-macho-nor-*mandilón*. He will likely think of himself as a man in a variety of ways, none of which necessarily coincides with the views of his family and friends.

In terms of the group of men who have sex with other men, this includes among others the male prostitute *potos* who have sex for money with other men and always play the "active role," and the *homosexuales* (*maricas*, *maricones*, and so on) who are marked not only by their preference for male sex partners, but more generally by the low

54 On the issue of men's sexuality, and especially sex between men, see Gutmann 1996:Chapter 5.



cultural esteem in which they are held by many in society. Men who have sex with other men are by some people's definition outside the bounds of masculinity altogether, and would not even constitute a separate male gender type.

Yet while this taxonomy may indicate some important lines of demarcation, like all ideal typologising it hopelessly obscures salient differences which are so numerous that they can hardly be considered exceptions. And this is undoubtedly all the more true during liminal moments historically in which cultural categories lack clearly circumscribed boundaries. No man today in Santo Domingo neatly fits into any of the four categories, either at specific moments or much less throughout the course of his life. Further, definitions such as these resist other relevant but complicating factors like class, ethnicity, and historical epoch. "*El mexicano es muy hablador; habla mucho y no cumple*; The Mexican man is a big talker; he talks a lot but doesn't come through," one of the *muchachos* told me at the end of our discussion. So who represents the more archetypal *macho mexicano*: the man who wants many (male) offspring and later abandons them, or the man who wants few, works hard to earn money for them, and calls these his manly duties?

To unravel these stereotyped social roles, we must return to the point raised by Lancaster: machismo, in whatever guise, is not simply a matter of ideology.<sup>55</sup> Machismo in Colonia Santo Domingo has been challenged ideologically, especially by grassroots feminism and more indirectly by the mainly middle class feminist and gay rights movements.<sup>56</sup> But it has also faced real if usually ambiguous challenges in the forms of the strains of migration, falling birthrates, exposure to alternative cultures on TV, and so on. These economic and sociocultural changes have not automatically led to corresponding shifts in male domination, in the home, the work place, or society at large. But many men's authority has been undermined in material, if limited, ways, and this changing position for men as husbands and fathers, breadwinners and masters has in turn had real consequences for machismo in Santo Domingo.

To be a macho for most people in Colonia Santo Domingo involves qualities of personal belligerence, especially though not only as directed toward women, and in this sense it is very tied to appearances and style. In substance, this veneer of arrogance and hostility derives on the part of some men from feelings of superiority — and repeated and

55 Lancaster 1992. Though it includes this aspect, as Fernández Kelly (1976) makes clear in a paper on some of the ideological foundations of the notion of machismo.

56 See Massolo 1992; Stephen 1997.

regular actions to back up these sentiments. At the same time, in Santo Domingo some men may seek to hide deep fears of physical inadequacy and losing male prerogative behind the guise of the macho. Women in particular talk of men who match the second description, referring to them in terms of disdain, ridicule, and even pity.

### MEXICAN MACHISMO: THE USE AND ABUSE OF ANTHROPOLOGY

The words macho and machismo have become a form of calumny, shorthand terms in social science and journalistic writing for labelling a host of negative male characteristics in cultures around the world. A researcher at the Center for Gender Studies in Moscow told a reporter in 1994, "Before the view of Russian men were as creatures without willpower who drink too much. Now they have the ability to make money, they want everything in this life. They have that macho feeling."<sup>57</sup> This is illuminating: men who drink too much are not called macho, yet those who have money more easily acquire "that macho feeling." In earlier examples cited, male sexual conquest and procreation are central themes, as are bragging and defiance of death.

And the writings of Oscar Lewis continue to be cited by anthropologists as the empirical source for more recent analyses of Mexican masculinity. The use of Lewis to prove alleged "national" traits like machismo seems particularly abusive because despite the fact that Lewis was writing at the high tide of national character studies in anthropology, in contrast to the homogenising portraits created by other ethnographers, Lewis consistently emphasised the diversity of cultural life along the lines of class, ethnicity, and age, in Mexico as in all countries where he conducted his research. Yet in spite of these efforts, to this day, one way or another, the prevalent assumption in anthropology and more popularly continues to be that we all know what machismo means and what machos do and that the task of social scientists after Oscar Lewis is principally to find cultures in which machos flourish as much as they supposedly do in Mexico.

An equation of machismo with Mexican culture as a whole has occurred well beyond the confines of mere social science, of course; it has also been common in the stories Mexicans tell about themselves, both in daily discussions among Mexicans as well as in the grand proclamations of the scholarly elite. Stereotypes about machismo are critical ingredients in the symbolic capital operated by ordinary Mexicans. Even if verbally denigrated by many, machismo is widely

<sup>57</sup> Cited in Stanley 1994:7.

regarded in Mexico as constituting part of the national patrimony in the same way as the country's oil deposits are a source of national if not necessarily individual self-identity. In this manner machismo has become part of the more general political economy of cultural values in Mexico.

Authoritative discussions of machismo in Mexico, or what later came to be known as machismo in some form,<sup>58</sup> have all made connections between the macho who "represents the masculine pole of life"<sup>59</sup> and the broader social and political world of 20<sup>th</sup> century Mexico.<sup>60</sup> Just as Lafaye has shown with regard to the Virgen de Guadalupe,<sup>61</sup> so too with Mexican masculinity: it has not always represented the same kind of national symbol, but rather has been used for different purposes at various times to emphasise particular cultural nationalist qualities by a vast array of social forces.<sup>62</sup>

In Colonia Santo Domingo, as elsewhere in the Republic, the fate of machismo as an archetype of masculinity has always been closely tied to Mexican cultural nationalism. My good friend César commented to me one day about drinking in his youth, "More than anything we consumed tequila. We liked it, maybe because we felt more like Mexicans, more like *lugareños* [equivalent to homeboys]."

For better or for worse, Ramos and Paz gave tequila-swilling machismo pride of place in the panoply of national character traits. Through their efforts and those of journalists and social scientists on both sides of the Rio Bravo/Grande, the macho became "the Mexican." This is ironic, for it represents the product of a cultural nationalist invention: you note something (machismo) as existing, and in the process help foster its very existence. Mexican machismo as national artefact was in this sense partially declared into being.

And from the beginning the portrayal of machismo (or its *pelado* forerunner) has been uniquely linked to the poor, unsophisticated, unc cosmopolitan, and un-North American. From the 1920s on in Mexico, the bourgeoisie and the middle classes were, in Monsiváis' words, "obstinate in seeing nationalism as the most fruitful for their progress and internal coherence."<sup>63</sup> The macho-*pelado*, always eminently male, was either like Jorge Negrete, the homespun figure from Mexico's rural past, or he was the essential backwardness of the

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58 See Ramos 1962, Paz 1961.

59 Paz 1961:81.

60 On Mexican national identity, nationalism, mexicanidad, and lo mexicano, most recently, see Bartra 1992 and Lomnitz-Adler 1992.

61 Lafaye 1976.

62 See also Bushnell 1958; Wolf 1958; Alarcón 1990.

63 Monsiváis 1976:194.

nation, rural and urban, which needed to be exposed and eradicated. On the other side of the class ledger, nearly all union leaders and many leftist intellectuals in Mexico for much of this century have championed the cause of national progress by promoting the heroic figure of the proletarian male militant. In all versions, Mexican masculinity has been at the heart of defining a Mexican nation, its past and its future.

Defining the words macho and machismo must not be done arbitrarily. Is macho to be considered brutish, gallant, or cowardly? These things change over time for various sectors of Mexican society, and we must not ignore the often elusive and mutually exclusive ways in which these catchwords are today employed in Mexico. And, needless to say, social scientists in the United States must not assume that they are privy to the sole legitimate understanding of the terms. Nor should we forget that masculinity, like the family, is not simply a precondition but is a product of men and women's cultural efforts. Michelle Rosaldo made this clear in writing that, "To claim that family shapes women is, ultimately, to forget that families themselves are things that men and women actively create and that these vary with particulars of social context."<sup>64</sup>

Like religiousness, individualism, modernity, and other convenient concepts machismo is used and understood in many ways. And history in the form of nationalism, feminism, and socioeconomic conjunctures impinges directly on gender identities in Mexico, including on what masculinity and machismo mean and how they are variously regarded. We either accept the multiple and shifting meanings of macho and machismo or we essentialise what were already reified generalisations about Mexican men in the first place. Like any identity, male identities in Mexico City do not reveal anything intrinsic about men there. Their sense and experience of being hombres and machos is but part of the reigning chaos of the lives of men in Colonia Santo Domingo at least as much as the imagined national coherence imposed from without.

64 Rosaldo 1980:416.



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# Nosotras Representations of Gender and Class Identities of Female Office Workers in Post-Revolutionary Mexico<sup>1</sup>

Susie S. Porter

*"We are shorthand typists! What a lot of unsettling questions are made by those who surround us. How they criticize and condemn us, and how little they know and understand us. If we triumph, they attribute it to chance or to our coquetry."*

Sarah Batiza, *Nosotras, las taquígrafas* (1949)<sup>2</sup>

## INTRODUCTION

In 1949 Sarah Batiza published *Nosotras, las taquígrafas* (*We women, the shorthand typists*), which she prefaced with a brief meditation on the condition of female office workers, from which the opening quote of this essay was selected. The preface frames Batiza's work, first by positioning the pages that follow as truths that will belie misunderstandings of female office workers. While the book is written as a novel, it takes the tone of documentary loosely held together by

1 This essay was written as a presentation for the Independent Study Committee on Mexico at York University, Canada. I would like to commend, and thank, the students who organized this impressive conference, especially Jessica Perkins.

2 All quotes appear in their original language in the footnotes. "¡Somos taquígrafas! ¡Cuántas inquietantes preguntas se hacen a nuestro alrededor! ¡Como se nos critica y condena y que poco se nos conoce y comprende! Si obtenemos un triunfo, se atribuye a la casualidad o a nuestra coquetería." Sarah Batiza Berkowics, *Nosotras, las taquígrafas* (Ciudad de México: Editorial Stylo, 1950, 1949 publishing), 9-10. Batiza (b. 20 Mar. 1914, Mexico City), studied typing and shorthand at the Miguel Lerdo de Tejada Commercial School in Mexico City. Batiza went on to publish several more novels and stories that appeared in *el Magazine Dominical de El Universal*. *Nosotras, las taquígrafas*, was awarded the Certamen Cultural de los Talleres Gráficos de la Nación, en 1949. In 1950 Alfonso Patiño Gómez adapted the novel into a film, which was produced by Salvador Elizondo and directed by Emilio Gómez Muriel.

fictional narrative. The fictional tone serves to soften the edges of the critique of social conditions described therein. Batiza's personal history as an employee in the Ministry of Finance further validated the observations contained in the novel. Indeed, it was Batiza's experiences as a shorthand secretary in the Ministry of Finance that served as the basis for this, her first novel. The selection from the preface also points to two issues, one regarding representation: what is the relative weight and power of "unsettling questions"? And two, a question of the representation of the conditions of work for women: how does femininity — "coquetry" — define job skills for female office workers? The relationship between work discipline and the disciplining force of gender was a two-way relationship. Within the logic of representation, the conditions of work served as a disciplining force in shaping gender norms. The conditions of work, in part, include class identities and associated characteristics and include representation of the female body, virtue, and ethnicity. I argue that class-bound gender norms came to form the basis of the *empleada* (female office worker) skill-set — to use an anachronistic term; or in other words, femininity was a requirement of the job.

Historians generally view gender as the web of ideas by which societies understand what it means to be male and female; it includes concepts of relations between and among the sexes, as well as categories of understanding power relations associated with gender difference.<sup>3</sup> One of these relations of power is class. While class is frequently discussed as an aspect of material conditions — occupation, salary, standard of living — in this study, like gender, class also functions on an ideological level. That is to say, class is constructed through both material and discursive conditions. Class is a category of understanding that may or may not correlate to the material position of the speaker, or the subject. This essay examines a series of texts and takes inspiration from the theories of Pierre Bourdieu, who has written extensively on how to think about class as an ideological and material construct.<sup>4</sup> In part, class identity was created through the association of a series of cultural practices with class status. If femininity played a central role in marking class, then specific aspects of femininity were all the more fundamental than others, namely female virtue and sexual morality.<sup>5</sup>

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3 Joan Wallach Scott, *Gender and the Politics of History* (New York: Columbia University Press, 1988), 42-43.

4 Pierre Bourdieu, *Distinction: A Source Critique of the Judgment of Taste*, Richard Nice, trans. (London: Routledge, 1984), 482-84.

5 For a complementary analysis of women in office work in the United States today, see Jennifer Johnson, *Getting By On The Minimum: The Lives Of Working-Class Women* (New York: Routledge, 2002).

Again, Bourdieu is useful when he shows us how cultural practices, which in my work are femininity, evolve from arbitrary individual taste to cultural legitimacy employed in the service of defining status/class. Goods and bodies are transformed into distinctive signs of class. In post-revolutionary Mexico norms of femininity evolved from individual gestures, or "taste," to become part of the cultural legitimacy of female office workers.

Most recent studies of public employees in Latin America have construed the middle class as male.<sup>6</sup> This statement could be qualified by mention of the important exception of teachers, for whom education proffered middle class status, despite low salaries; however, while the rich scholarly literature on teachers has addressed many important issues, it gives scant attention to the question of class. Although this association of middle class with male resonates with historical perceptions of public administration, it ignores the feminisation of government work that occurred in the post-revolutionary period. Yet other histories of women have included women who the author identifies as middle class, usually a female reformer imposing her values on working class families; however, class is used to indicate power inequities and is not taken as a contested identity.

### "RESPECTABLE WORK FOR WOMEN"

To fully understand representations of *empleadas*, it is important to note that women entered into office work in the late 19<sup>th</sup> century, during which time important associations between office work and middle class status emerged.<sup>7</sup> During the almost continuous thirty-five year rule of Porfirio Díaz (1876-1911), known as the Porfiriato, Mexicans frequently spoke of occupation in government offices as the prerogative and even foundation of the middle class. Indeed, public administration work has long been thought of as the provenance and sustenance of the middle class in Latin America.<sup>8</sup> During the 1890s women had entered into a wide range of new occupations, many of them in factories and

6 David Stuart Parker, *The Idea of the Middle Class: White-Collar Workers and Peruvian Society, 1900-1950* (Pennsylvania: Pennsylvania State University Press, 1998). On teachers see, for example, Mary Kay Vaughan, *The State, Education, and Social Class in Mexico, 1880-1928* (DeKalb: Northern Illinois University Press, 1982).

7 Susie S. Porter, "Empleadas: la necesidad económica, la moral sexual, hábitos de consumo, y el derecho de la mujer al trabajo," *Signos históricos* (Jan.-June 2004): 40-63.

8 On the relationship between public administration and the middle class in Latin America see David Stuart Parker, 99, 101, 149; Brian P. Owensby, *Intimate Ironies, Modernity and the Making of Middle-Class Lives in Brazil* (Stanford: Stanford University Press, 1999), 54. For Mexico see Soledad Loaeza, *Clases medias y política en México* (México: El Colegio de México, 1988).

workshops. For many Mexicans the opening of government offices to the employment of women during the Porfiriato was as a sign of progress. Office work represented a new option, and those who viewed it favourably hailed office work as clean, non-manual, and as a fortunate new opportunity for "respectable" women. The term "respectable" was a means of speaking about middle class status, which included non-manual labour. The newspaper *La Convención Radical Obrera* praised the opening of government offices to women, stating that "[it] all contributes to the preparation of the poor woman a decent means of subsistence, in the midst of overwhelming social needs, separating her from the path to perdition.<sup>9</sup> At the same time, prevailing notions that middle class women did not work outside of the home led others to necessarily consider any woman who did work outside of the home, even in an office, as therefore outside of the middle class.

Throughout Latin America, education has been one of the markers of middle class status.<sup>10</sup> The status conferred to a position in a government office was due more to the cultural attainments of the job than to the salary paid for the work. One of those cultural attainments was work that required an education and was sometimes characterised as "intellectual," in this instance a word used to signify non-manual. A non-manual job filled by a person who received an education contributed to the characterisation of that job as "respectable." However, while civil service jobs were qualified as non-manual, the salaries paid to many government employees ill-afforded the trappings of middle class life. The wages received by both male and female teachers, for example, often did not provide for a middle class standard of living. In 1877 Adolfo Guillermprieto lamented that teacher's wages were on par with that of taxi drivers.<sup>11</sup> An 1894 article in *La Convención Radical Obrera* expressed concern that although women could get the education required for an office job, the cost of it well exceeded the benefits of the salary for "trabajo intelectual."<sup>12</sup>

## DAUGHTERS OF THE REVOLUTION

The Mexican Revolution (1910-1917) and conversations about gender and class identities in the post-revolutionary periods profoundly shaped

9 "Todo contribuye a preparar para la mujer pobre un modo decente de subsistencia, en medio de las imperiosas necesidades sociales, apartándola de la carrera de la perdición."

10 See footnote 8 for suggested reading.

11 Moisés González Navarro, *La vida social*.

12 Anonymous, "Para las damas. Porvenir de la mujer", *La Convención Radical Obrera*, viii:867 and 868 (22 Apr. 1894 and 6 May 1894): 2-3 and 2. On teachers' salaries see Vaughan, *The State, Education, and Social Class*, 64.



the contours of portrayals of female office workers in Mexico. The Mexican Revolution was a multi class uprising against the Porfiriato. In post-revolutionary Mexico (1917-1940) and the subsequent decade of the 1940s, the female office worker was often portrayed as a product, somewhat unfortunate and unwilling, of the Revolution. The roots of this ambiguity can be found in the cross-currents of class identities, both its treatment by contemporary scholars as a subject of study, and in terms of how class relations were understood in post-revolutionary Mexico. While historians have devoted considerable time to analysing the role of rural and urban workers, and indigenous communities, their attention to the pivotal role of upper and middle class actors, while noted, as been less sustained.<sup>13</sup> Authors in post-revolutionary Mexico positioned the female office worker in a somewhat ambiguous position within class relations in Mexico, caught between the working class and the middle class, and sometimes as embodying perceived contradictions between these two classes. Political rhetoric that privileged the working class, whether or not that rhetoric was reflective of the distribution of resources and power, also informed the fictional portrayal of female office workers.<sup>14</sup> Analysis of the representation of female office workers gives us entrée into some of the issues at stake in the formation of middle class identities in post-revolutionary Mexico.

The initial entrance of women into office work during the Porfiriato, and the values associated with that work, laid the foundation for the rapid expansion of women's places in government offices between 1920 and the early 1940s. The main impetus of expansion in the numbers of women in office work was in public administration, and was an integral part of the expansion of government work overall. As the leaders of the Revolution implemented new programmes, women filled government offices. Revolutionary leaders' projects included the creation of new offices and the integration of new personnel. Scholars have given the most sustained attention to teachers; however, a wide range of employees also worked in the offices that managed the reform of labour, agriculture, and social life so closely associated with the revolutionary project. They headed up newly formed government offices, staffed these offices as functionaries, consultants, managers, teachers, inspectors, secretaries, bookkeepers, workers, and service

13 Michael F. Jiménez, "The Elision of the Middle Class and Beyond: History, Politics, and Development Studies in Latin America's 'Short Twentieth Century'", in Jeremy Adelman, ed., *Colonial Legacies: The Problem of Persistence in Latin American History* (New York: Routledge, 1999), 207-228. Soledad Loaeza, *Clases medias y política en México* (México: El Colegio de México, 1988), 69-70.

14 See, for example, Kevin Middlebrook, *The Paradox of Revolution: Labor, the State, and Authoritarianism in Mexico* (Baltimore: The Johns Hopkins University Press, 1995).

workers. In 1921 there were 14,171 people employed in public administration, and by 1930 they numbered 47,000.<sup>15</sup> Furthermore, the insurance and banking industries grew, and along with commerce, hired growing numbers of women to work as sales clerks, secretaries, and filers, to name a few of the many new occupations.

Two important shifts in women's participation in public administration occurred during the late 1930s. First, women took to government work in growing numbers, at a rate of increase that exceeded that of men. Between 1921 and 1930 the number of women in public administration increased by 2,000%. During this same time the number of men increased by 300%, also representing rapid growth, though less so compared to that of women. Despite the impressive percentage increase in women, men continued to dominate public administration in 1930 when they were 87% of those workers.<sup>16</sup> Second, women played an increasingly visible role in bureaucratic spaces unrelated to the "female occupation" of education.<sup>17</sup> In 1938 the number of female employees (12,838) surpassed the number of female teachers (12,126). Nevertheless, women as a percentage of occupations unrelated to the field of education remained a minority of that workforce in 1938; women were 24% of the total of 53,160 *empleados* (as distinguished from *maestros* (teachers) in the census).<sup>18</sup> Even with such gains, women did not outstrip men in public administration in numbers, as a percentage of the workforce, or in career advancement. The changes that did occur occasioned important cultural shifts that came to life in novels, short stories, magazines, and movies.

The authors of the two novels here under consideration wrote about female government employees and portrayed those women as products of the Revolution. The first novel was written by Mariano Azuela, who himself had worked for the Mexican government in the 1930s. Mariano Azuela is the author of *Los de Abajo* (*The Underdogs*), among the most celebrated novels of the Mexican Revolution, which charts the rise and fall of humble people in rural Mexico as they are swept up in the chaos of the war that ravaged Mexico for at least seven years. A central quality of the novel is Azuela's cynicism regarding individual opportunism in the context of revolutionary idealism and bloody civil war. *Los de Abajo* is paradigmatic of the approach novelists and scholars have taken to write about the Mexican Revolution, inasmuch as rural Mexico has been the focus of subsequent historical

15 Alicia Alva, "La Mujer en el Trabajo," *El Nacional*, 27 July 1933.

16 Alva.

17 Sex-typing of teaching as feminine work was a relatively recent phenomenon, dating to the 1890s.

18 México. Dirección de Pensiones Civiles. *Tercer Censo de empleados federales*, 1938:36, 51.

studies, and has formed the backbone of Mexican historical studies. Less known is Azuela's novel *Regina Landa*, the story of a young female shorthand typist (of the same name) in 1930s Mexico City.<sup>19</sup> That a novel about urban life that focuses on a female office worker did not rise to the prominence of *Los de Abajo* is perhaps indicative of the lack of a cultural space for that which was female and urban. Nevertheless, Azuela describes Regina as a virtuous daughter of the Revolution. Regina's father had been a combatant who had not, like so many others, taken advantage of the spoils of war. As a consequence, Regina found herself in financial straits and left to fend for herself. The family had managed to get by due to the good economy of Regina's housewife mother. However, when her father dies, Regina goes to live with her sister and brother-in-law and is forced to find work outside of the home in order to contribute to the household. The circumstances that bring Regina to office work are relevant to establishing a genealogy that traces back to the Revolution, and the bureaucratic State that claimed it.<sup>20</sup>

Although Sarah Batiza published *Nosotras, las taquígrafas* in 1949, more than a decade later than *Regina Landa* and well after what many would think of as the culmination of the Revolution, Batiza also construes her story as a legacy of the Revolution. The character Bertha is from Torreón, for example, and comes from a family that lost its land and hacienda in a government-sponsored land redistribution programme. Bertha's family then migrates to Mexico City and requires the labour of their daughter to maintain their standard of living. Alex and Esther, two other central characters in the office, come from families of the provincial elite, and who due to circumstances associated with the Revolution, are forced to migrate to Mexico City and to find work. That these various characters are daughters of the Revolution takes on significance because it allows these authors to construe *empleadas* as reluctant, and therefore imperfect, participants in the world of work. It also reflects the rapid expansion in the number of women who worked for the government during the 1930s. Both Azuela and Batiza echo cultural understandings prevalent in post-revolutionary Mexico, such as the idea that women worked in offices, and should only work outside of the home in the absence of a male provider; and, that the State stood in the stead of that male breadwinner.

19 Mariano Azuela, *Regina Landa* (México: ediciones Botas de México, 1939).

20 Azuela 7-8. Azuela reiterates his critique of post-revolutionary plunder in the virtuous portrayal of Regina's friend Esther Mediola, from the north, a family with property and money that the revolutionaries stole; father and brother shot during the revolution. On the intertwined nature of state bureaucracy, political party, and the Revolution, see Luis Javier Garrido, *el partido de la revolución institucionalizada; la formación del nuevo estado en México (1928-1945)* (México: siglo veintiuno editores, 1982).

The legacy of the Revolution goes beyond the explicit portrayal of female office workers as a product of the Revolution. The fictional portrayal of *empleadas* is also shaped by ideological influences of post-revolutionary rhetoric. In the post-revolutionary period, especially during the 1930s and the presidency of Lázaro Cárdenas (1934-1940), the state privileged work-based identities, be they rural or urban, upon which citizens could make claims for both financial and political resources. Historians have documented the way cultural categories such as *campesino* came into being as they framed the means by which a range of rural workers and landowners could make demands on the State for resources, both material and political.<sup>21</sup> When Azuela and Batiza associate *empleadas* with the identity of worker, they seek to create sympathy in the reader for the female employee. At the same time, Mexicans associated office work with “respectability,” non-manual labour, and middle class status. Given these coexistent tendencies, Azuela, Batiza, and even contributors to the magazine *Nosotras* (discussed in detail below) cultivate contradictory associations of female office employees with both the identity of worker and with that of the middle class.

Mariano Azuela opens the novel *Regina Landa* with a description of the office where the protagonist, Regina, seeks employment. Azuela offers the reader the government office as a grey and factory-like workplace.<sup>22</sup> The voice of the narrator refers to office work as slavery, and comments that “every gesture of liberty offends.” After a survey of the office, the narrator states: “there is nothing enviable in being an *empleada*.”<sup>23</sup> After her first day at work, Regina feels dejected and humiliated by how she is treated and the conditions of work. She states that she will never return to the office, that she will work as a maid, but not in an office.<sup>24</sup> This comment builds on prevailing conceptions of hierarchies of occupations, and places office work at the lowest rung of work occupations for women. At other times Azuela refers to Regina as being of “extremely humble” origins.<sup>25</sup> Later in the novel, the character Miguel Angel accuses a man of being bourgeois, because he employs, and by implication exploits, a seamstress, while Miguel Angel praises Regina as “proletariat” because she works by the labour of her hands that type.

21 Christopher R. Boyer, *Becoming Campesino: Politics, Identity and Agrarian Struggle in Postrevolutionary Michoacán, 1920-1935* (Stanford: Stanford University Press, 2003).

22 Azuela 11.

23 Azuela 18, 26, 27.

24 Azuela 13, 177.

25 Azuela 54.



The office as factory was a portrayal that would last into the 1940s. In 1944 a group of female office workers came together to publish the magazine *Nosotras; el boletín de las empleadas para las empleadas*, (which ran from February 1944-1964). The women who promoted and contributed to *Nosotras* worked almost exclusively in private industry, and especially in the banking and insurance industries. Most of the women were members of the Interparroquial Circle of Female Employees of Mexico, a member of the Diocesan Committee of the Female Mexican Catholic Youth organisation (Círculo Interparroquial de Empleadas de México, dependiente del Comité Diocesano de la JCFM de la Unión Diocesana de México), itself a member of Catholic Action (Acción Católica).<sup>26</sup> Contributors to the magazine differed from Azuela and Batiza in an important way when they associated female office workers not with the Revolution, but with “la vida moderna.” As employees in private industry, contributors to *Nosotras* disassociated themselves from the Mexican state and the women employees in its bureaucracy.<sup>27</sup> Nevertheless, some of those women would categorise the office in ways that echo the association of office work with a working-class occupation, when, for example, one contributor wrote “the ambience, so often monotonous and depressing, of the office, where one only hears the typing of the machines, feverish and hurried labours deaden and tire.”<sup>28</sup>

The representation of *empleadas* as associated with the identity of worker came into conflict, however, with older associations of office work as a middle class occupation. The texts here under consideration worked with several codes of middle class identity: education, “culture,” and presentations of the body – which included modesty in dress; restraint in the use of cosmetics, and cleanliness; and, female sexual virtue.

One of the factors that contributed to distinguishing office work from manual labour was its association with education. Almost every issue of the magazine *Nosotras* included an article on how women could further their job prospects by furthering their education. Education was not, however, a direct means to an end; it was not simply about learning to type or to take dictation; indeed, commercial schools taught languages, piano, and physical education, in addition to typing, filing,

26 Monthly publications. Director, Margarita Baz; Chief Editor, Ma. Elena Murguía Q; Administration, Ana Ma. Patiño. Annual subscription cost \$1.50, or \$0.15 per individual issue. In *Nosotras* 1:2 (Mar.), 4.

27 Interview conducted by Susie S. Porter with Señora Rosa Margot Ochoa, a contributor to *Nosotras* in the early 1940s, conducted on 12 Apr. 2006.

28 Angelina, “¡Surge!,” *Nosotras* 1:3 (Apr. 1944), 8. “El ambiente, tantas veces monótono y deprimente, de la oficina, donde sólo se oye el rítmico tecleto de las máquinas, donde enerva y cansa la tarea febril y apresurada.”

and shorthand.<sup>29</sup> Rather, for *empleadas* education was in part a means of acquiring cultural capital. For example, Batiza notes that the central character María Eugenia had studied to be a secretary to expand her general knowledge, not with the intention of actually having to work.<sup>30</sup> The texts speak of education with a forked tongue; while education is first an acquisition that women do not intend, or should not utilise, it is secondarily one that a woman can use, if the need arose.

In Mexico, the word “education” could mean schooling but it could also mean what Mexicans then referred to as “culture,” and what Pierre Bourdieu would term symbolic capital. An article in *Nosotras* (magazine) exemplifies this. The column appeared regularly and followed a format of qualifying appropriate and inappropriate behaviour under the headings “Yes” and “No.” A picture and description of a woman in simple dress applying makeup is accompanied with the words:

Yes...It is one of the things we have always recommended. Cleanliness and tidiness are indispensable. A light touch on your lips and cheeks; a hairdo (of course showing all due discretion); [and] No...to convert public transportation into a powder room says very little of your good education.<sup>31</sup>

Characters in Batiza’s novel also equate beauty with being well-dressed, both of which they qualify as an expression of “education.”<sup>32</sup>

The magazine *Nosotras* stands out as one of the means by which contributors sought to disassociate office work from manual labour, and that was in its construal of office work as spiritual work. As a magazine sponsored by Catholic Action it is not surprising to find that religion, spirituality, and Catholicism specifically filled the pages of the magazine. It is, nevertheless, noteworthy that contributors often stated explicitly that the spiritual aspect of a woman’s workday made the work non-manual.<sup>33</sup> Rosa Margot Ochoa, who worked for several decades at BANAMEX as an executive secretary, and who was a frequent contributor to *Nosotras*, thought of herself as middle class. And although she described herself as not actively religious, she held as a cherished possession a golden crucifix given to her by her employer. In addition to her contributions to *Nosotras*, Ochoa also wrote for the BANAMEX employee magazine, the pages of which were filled with

29 Porter, *Empleadas*.

30 Batiza 40.

31 “Sí... Es una de las cosas que siempre hemos recomendado. La limpieza y el arreglo son indispensables. Un ligero toque en tus labios y mejillas; un peinado (todo con discreción desde luego). No...El convertir los transportes, la calle y otros sitios públicos en tocador, dice muy poca de tu buena educación.” “Sí... No...” s.a. (2:21, 10-11 nov.)

32 Batiza, 74.

33 For example, see Angelina, “¡Surge!” 8.

news of Catholic weddings, baptisms, and other Church-related cultural events.<sup>34</sup>

Given the confluence of different class identities associated with office work, it is not surprising then that contradictions in class identification emerged. What can we make of these contradictions? For one, perhaps the place of the work and occupation did not serve as the primary site of identity formation for female office workers. The characters that inhabit the offices in the two novels (*Regina Landa*, 1939 and *Nosotras*, 1949) come from a variety of social backgrounds, and the differences in the portrayal of class status of the characters are significant.<sup>35</sup> Mariano Azuela insinuates that women of "culture" ended up having to work with women "without culture," or at least that some viewed it that way. Women working in the same office, in the same occupation, are described as having distinct class status. This was the case of Cuca and María Eugenia in *Nosotras, las taquígrafas*. The titles of two of the texts give us a lead. The title "Nosotras" suggests the importance of gender in the work-identity of female office workers. One could argue that rhetorically, female office workers, whether in private business or government office, all required similar skills and faced similar working conditions.<sup>36</sup> Whether or not this was indeed the case remains to be seen through further investigation.

One of the factors that shaped the working conditions of all female office workers in all these texts is virtue. For the contributors to *Nosotras* (magazine), and perhaps to its readers, the work of employees was the result of "la vida moderna."<sup>37</sup> For this new occupation, women required new skills. And while many of those new skills included the more obvious ones of dictation, typing, and filing, the skills to which commentators gave the most attention was that of navigating the turgid seas of moral threat.<sup>38</sup> Luz María Rivadeneyra, contributor to *Nosotras* (magazine), lamented that when a young woman goes to work in an office, business, bureau, or any of the many other places women now work, that they ask after their preparation, referring to her intellectual preparation or technical skills, not her moral preparation, the latter of

34 Interview with Señora Rosa Margot Ochoa, conducted by Susie S. Porter, 12 Apr. 2006.

35 "Evita Quedar Atrapada por las Deudas" *Nosotras* 1:4 (8, 13 May), 8, 14; and "Cual de los 3?" *Nosotras* 1:1 (Feb.), 13.

36 "Cualidades esenciales del trabajo", *Nosotras* 1:5 (July), 6, 9. "Las necesidades de la vida te obligan a abandonar el hogar familiar en donde encontrarías abrigo y tus ocupaciones normales. Sales cada mañana, llena de valor y buen humor, a la conquista del pan. Entrás al taller, al almacén, a la oficina, y ahí encuentras compañeras que, como tú, tienen necesidad de trabajar para vivir..."

37 Luz María Rivadeneyra, "Virtudes; ¿Cuales son las Virtudes Necesarias para la Mujer que Trabaja?", *Nosotras* 1:2 (Mar. 1944).

38 Rivadeneyra.

which, she argued, "is the one which will determine her capacity, energy, and tact to fulfil her obligations."<sup>39</sup>

Social relations among women, and between women and men, play a central role in all of the texts here under consideration. Indeed, such social relations serve as proxy for an analysis of workplace relations. Friendship and betrayal; loyalties and jealousies; camaraderie or courtship; and, love and the prospect of marriage: all of these topics filled the pages of the novels, short stories, and articles written by and directed at *empleadas*.<sup>40</sup> Rather than consider these issues as diversions from the drudgery of work, I suggest we look at these as workplace relations that the *empleada* had to negotiate with skill, to the benefit or detriment of her job. Two points regarding context: First, the entrance of women into a new workplace implied a new space of interaction with men. Rules of the game had to be worked out. Similar to when women took to factory work in large numbers at the turn of the century.<sup>41</sup> Second, marriage was still thought of as the primary vocation for women. So if one is at work all day, and the goal is to get married, not to progress in one's career, then clearly these issues will arise.<sup>42</sup> Women who took jobs as *empleadas*, though, were caught in a contradiction within the context of unequal power relations between the men and women in the workplace, both because of gender privilege (of men) and the work advantage of the men who had degrees and almost always occupied positions above women.<sup>43</sup> In all the texts presented in this essay, class circumstances impede an easy path to marriage, most often to the detriment of women. Azuela's work associates access to male *licenciados*, higher ups, with corrupted female honour; characters argue that "women wanting to marry up make themselves ugly." A virtuous woman might marry a man she met in the office, but leave the workplace before doing so.

Youth, too, serves as a definer of marketability. Azuela portrays all office women as single; those women who marry leave their employment.<sup>44</sup> Sarah Batiza treats the issue in painful detail in *Nosotras, las taquígrafas*, while those who do not marry are usually portrayed with sympathy, it is clear that being an old maid (*quedada*) is not an enviable status. And the window for marriage is brief. A woman

39 Rivadeneira.

40 Comisión Central de Empleadas de la JCFM, "Noviazgo", *Nosotras* 1:3 (10-11 April).

41 Susie S. Porter, *Working Women in Mexico City: Public Discourses and Material Conditions, 1879-1931* (Tucson: University of Arizona Press, 2003).

42 Alexandra Pita González, "Las mujeres y el matrimonio en las obras de Mariano Azuela," in Álvaro Ochoa Serrano, coord., *Escritores y escritos de la revolufia* (Zamora: El Colegio de Michoacán, 2004).

43 Batiza 36.

44 Azuela 103.



of 25 is already considered as out of the market pool. The magazine *Nosotras* printed numerous articles celebrating female youth, and one author even arrived at mathematical calculations that left women with approximately three years to work and find a husband, at which time she would leave work.<sup>45</sup> A new model of the modern wife thus emerges from the new conditions of employment presented in office work.

Both Azuela and Batiza include characters that serve the function of expressing arguments against marriage; however, these characters function to discredit such opinions as either too caught up in the vogue of leftist rhetoric, or as simply unrealistic. In *Regina Landa*, Emma is president of "Izquierdas Femininas" a government-affiliated women's organisation that claimed its position on the left of the political spectrum; she is also "a famed orator" in the political and literary salon "*Letras y Artes*." Emma tells Regina that her idea of getting married and having lots of kids is "bourgeois."<sup>46</sup> Batiza portrays Blanca, a university-educated woman, as one who does not need a job and simply plays at work. Blanca is, nevertheless, vehement about women's independence. The voice of judgment is that of María Eugenia, who laments that for all her independence, Blanca has missed out on the better things in life, such as love.

Sarah Batiza provides a more complex take on the question of courtship, marriage, and inequality in the workplace.<sup>47</sup> She lays bare the double standard for men, for whom dating is a cavalier pastime without consequence, while for women, courtship and marriage is, in effect, tied to job stability and promotion, as well as a path out of the workplace.<sup>48</sup> Male *licenciados* hold sway over female secretaries and typists, both as men and as higher-ups at work. More often than not, men also are portrayed in Batiza's novel as of a better-off socioeconomic status. Men

45 Margarita, "Progresas en tu trabajo", *Nosotras* 1:1 (Feb.), 10-11. "Yo quiero suponer que trabajarás por un lapso de tiempo relativamente corto, unos cuatro o cinco años, y luego contraerás matrimonio con un hombre adinerado. No creo que la cultura que obtengas, con miras de progresar, te sobre en el futuro; por el contrario, te permitirá conversar y aun comprender mejor a tu esposo... Todo está en que tengas la suficiente inteligencia para que no por cultivarte, te vuelvas pedante; no por recibir un buen sueldo, te vuelvas derrochadora; ni por la independencia que el trabajo pueda proporcionarte o la categoría del puesto que desempeñes, te conviertas en una joven dominante, altanera, o despótica. Por el contrario, tengo la seguridad de que la mujer que trabaja, que tiene noción del valor del dinero ganado a fuerza de trabajo, que progresa debido a su esfuerzo, está más capacitada para apreciar y comprender muchas cosas en su futuro esposo; nerviosidad o cansancio provocados por el exceso de trabajo, exigencias y molestias causadas por él, necesidad de encontrar en su hogar reposo y tranquilidad cariño y comprensión."

46 Azuela 27-28.

47 Azuela 92, 102, 107, 136. "El jefe ha dicho en voz alta que antes de una semana serás suyo." Sanchitos gives her the advice: "una reputación que se pierde es una vida que se trunca. El matrimonio no es una mera fórmula ni rutina social."

48 Batiza 34.

drive cars while women take public transportation; men dine in fancy restaurants while women eat at home; men purchase for women the nice clothes that they “need” for work. This is a situation only made more difficult by the significant number of women looking for work.<sup>49</sup>

Through the character Lupita, Batiza acknowledges the desire for middle class status and the lack of recognition of this status. Lupita, though an office worker herself, is the daughter of a servant. As an office worker, Lupita says “I can’t marry someone of my same category now, now that I have known new worlds.”<sup>50</sup> Office work, in Batiza’s novel, has an acculturating effect on women from modest means.

One of the important ramifications of the folding in of gender norms into the repertoire of job skills was that gender norms took on a significance that competed with skills and qualities like seniority, etc. One story in *Nosotras* tells of a girl who is offended because a pretty girl, less qualified, was promoted ahead of her: “[Unfortunately], I am so sensitive... For example, the other day the boss wanted to dictate a letter and he called on Señorita Gómez — he said it and called right in front of me — when he knows that I have more time working than her and I am more competent and faster than her.”<sup>51</sup> The advice columnist responded to her complaint by pointing out “these little jealousies or perhaps omissions committed without any ill intention cause much suffering and at times are capable of making one fail, cutting off perhaps a brilliant future.”<sup>52</sup> Two counter examples that reinforce the same argument, because they are meant as a surprise in the narrative, are that in *Regina Landa* and *Nosotras, las taquígrafas* the main characters are both pretty AND competent.

## CONCLUSIONS

From the entrance of women into office work in the 1890s, through the post-revolutionary period, the portrayal of *empleadas* in print culture went through an important transformation, shifting from identification with qualities associated with the middle class to more close association with working-class identity. While this essay does not touch on the subject of how women themselves construed their class position, it does

49 Batiza 35.

50 Batiza 46. Later in passage, “El individuo que se escuda solamente con el nombre, es porque no vale, es porque de esa manera trata de que los demás lo consideren superior...” (46)

51 “En el Empleo”, *Nosotras* 1:5 (June). “Por ejemplo, el otro día el jefe dijo que quería dictar una carta muy importante y llamó a la señorita Gómez — lo dijo y la llamó en frente de mí — cuando sabe que yo tengo más tiempo de trabajar que ella y que soy más competente y más rápida.

52 “En el Empleo”, *Nosotras*. “Esas pequeñas envidias o acaso omisiones cometidas sin ninguna mala intención causan muchos pesares y a veces son capaces de hacer fracasar, cortando tal vez un brillante porvenir.”

show how novelists and journalists contributed to the class identities of *empleadas*. As the first opportunities for office work opened to women in Mexico City, many Mexicans hailed such work as a “respectable” option for women. Newspaper articles portrayed office work as “intellectual,” clean work. It was work for which many women had obtained an education. All of these qualities were ones associated with middle class identity. The Mexican Revolution of 1910 ushered in new political languages that privileged working-class identity. Within this context, Mariano Azuela, and later Sarah Batiza, as well as contributors to the magazine *Nosotras*, associated female office workers, and the office itself, with working-class culture. So while in the realm of national politics President Lázaro Cárdenas distributed political and material resources to those who identified as “working class,” so too Mariano Azuela distributed the resource of audience sympathy by calling on working-class identity. In 1949, Sarah Batiza presents a series of representations of office workers that account for socio-economic and racial diversity yet continues to associate virtue with female working-class identity.

Although class identity is central to the portrayal of female office workers, at important moments gender identity supersedes, and at times, is conflated with, class identity. Normative femininity and sexuality stand in for work relations. Friendship, courtship, dating, and sexual relations stand in for “labour relations,” promotion, and job success. In fictional and non-fictional portrayals of female office workers in post-revolutionary Mexico, qualities associated with femininity came to form an integral aspect of work and class identity. The intertwining of the identities contributed to their longevity. Norms of femininity and sexuality continue to shape labour relations in diverse sectors of the Mexican labour force, perhaps most visibly in *maquiladoras*.<sup>53</sup>

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53 Norma Iglesias Prieto, *Beautiful Flowers of the Maquiladora: Life Histories of Women Workers in Tijuana*, Michael Stone, trans. with Gabrielle Winkler (Austin: University of Texas Press, Institute of Latin American Studies, 1997).





# Acronyms

AMLO	Andrés Manuel López Obrador
ANIERI	Asociación Nacional de Instituciones de Enseñanza en Relaciones Internacionales
AUCC	Association of Universities and Colleges of Canada
CAFTA	Central American Free Trade Agreement
CMP	Canada-Mexico Partnership
CONABIO	Comisión Nacional para el Conocimiento y uso de la Biodiversidad (National Commission for the Knowledge and Use of Biodiversity)
CONAPO	Consejo Nacional de Población (National Population Council)
CUT	Comité de Unidad Tepozteca (Committee for Tepozteco Unity)
EOI	Export Oriented Industrialisation
EZLN	Ejército Zapatista de Liberación Nacional (Zapatista Army for National Liberation)
FDI	Foreign Direct Investment
FPDT	El Frente de Pueblos en Defensa de la Tierra (Front of Pueblos in Defence of the Land)
FTAA	Free Trade Agreement of the Americas
GATT	General Agreement on Tariffs and Trade
GDP	Gross Domestic Product
GEF	Global Environment Facility
GMO	Genetically Modified Organism
HDI	Human Development Index
IDB	Inter-American Development Bank
IFE	Instituto Federal Electoral (Federal Electoral Institute)

ILO	International Labour Organisation
INEGI	Instituto Nacional de Estadística Geografía e Informática (National Institute for Statistics, Geography, and Information)
INI	Instituto Nacional Indigenista (National Institute of Indian Peoples)
INS	Immigration and Naturalisation Services
IPS	International Policy Statement
ISI	Import Substitution Industrialisation
KS	Kladt-Sobrinho Group
MBC	Mesoamerican Biological Corridor
MSC	Multiple Service Contract
NAFTA	North American Free Trade Agreement
NGO	Non-governmental Organisation
PAN	Partido Acción Nacional (National Action Party)
PPP	Plan Puebla-Panamá (Puebla-Panama Plan)
PPY	ProNatura Península de Yucatán
PRD	Partido de la Revolución Democrática (Party of the Democratic Revolution)
PRI	Partido Revolucionario Institucional (Institutional Revolutionary Party)
RICAM	La Red Internacional de Carreteras Mesoamericanas (International Network of Mesoamerican Highways)
SAWP	Seasonal Agricultural Workers Programme
SEDESOL	Secretaría de Desarrollo Social (Ministry for Social Development)
SEMARNAP	Secretaría de Medio, Ambiente, Recursos Naturales, y Pesca (Ministry of the Environment, Natural Resources, and Fisheries)
SPP	Security and Prosperity Partnership
UNAM	Universidad Nacional Autónoma de México (National Autonomous University of Mexico)
WWF	World Wide Fund for Nature











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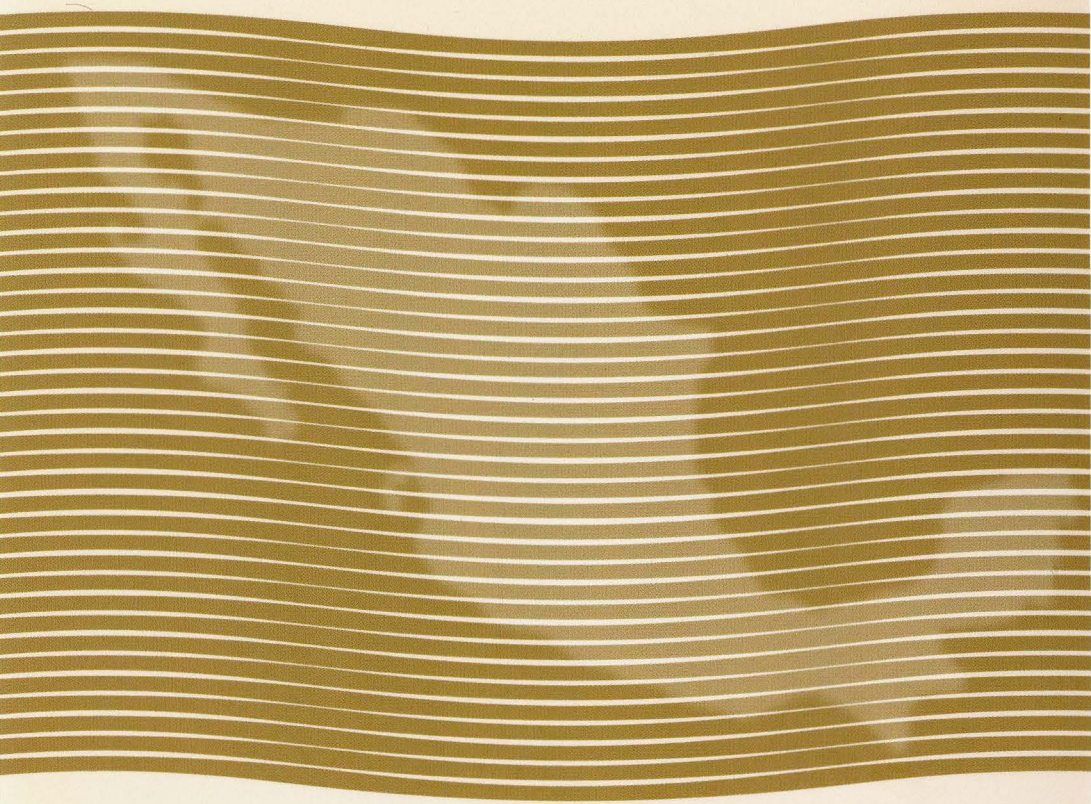
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## Independent Study Committee on Mexico



Left to right: Karen Campbell, Chad Craig, Jessica Perkins, Michael Thayer, Abbey Sinclair, Karen Murray



Mexico is a dynamic country that bridges the Americas. As the state works to further integrate with its neighbours, various actors have emerged that either encourage or challenge these efforts in their attempts to influence the direction of Mexico's progress.

This volume features essays from a variety of disciplines, and offers the reader a unique opportunity to explore a number of challenges facing Mexico as it continues to progress domestically, while asserting itself in the broader regional context.

